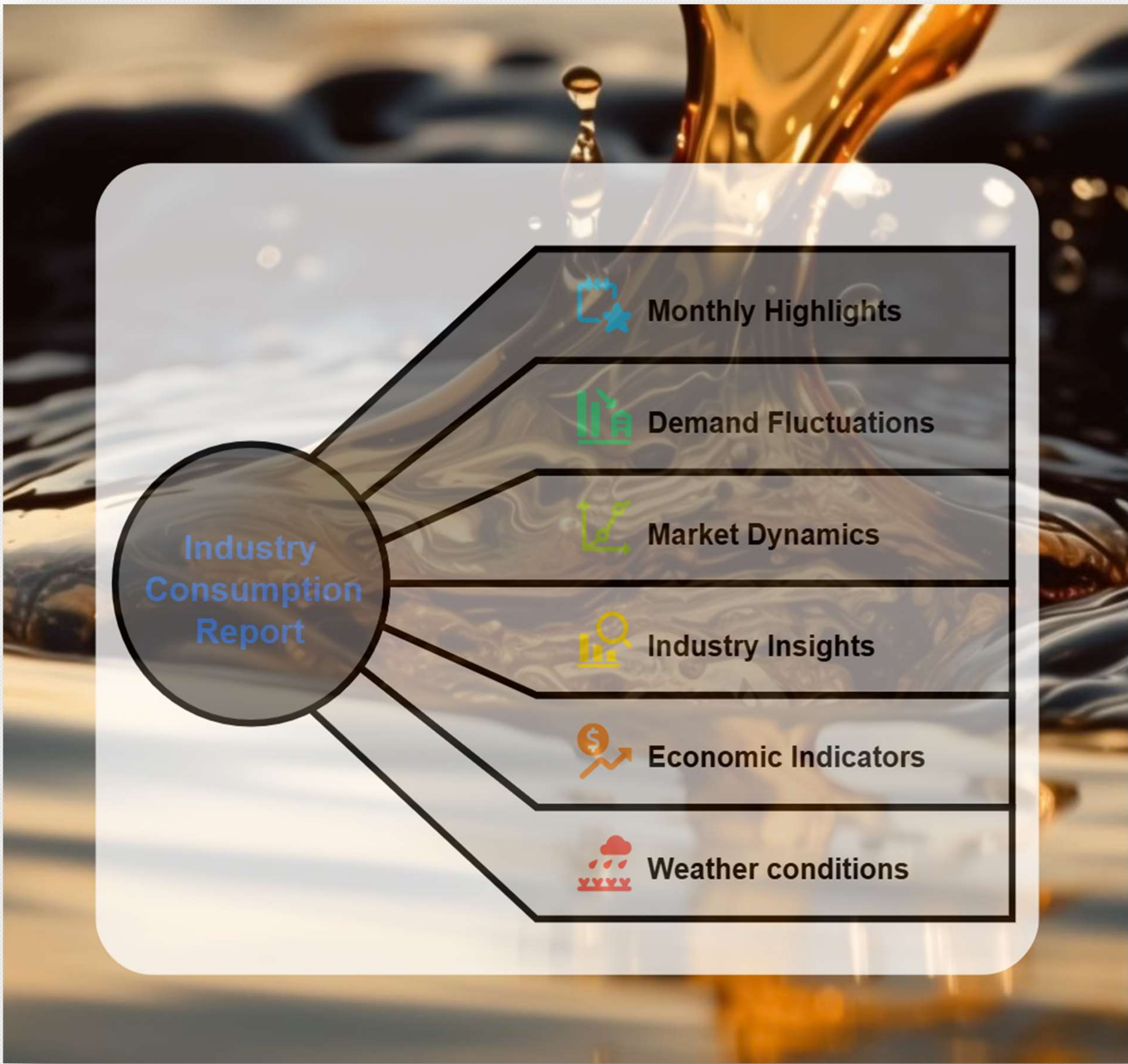

INDUSTRY CONSUMPTION REPORT POL & NG

AUG 2025

Contents

List of Tables

List of Figures

CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	**MoP&NG:**
निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)	PS to Hon'ble Minister (P&NG)
ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस)	OSD to Hon'ble Minister (P& NG)
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अपर सचिव, पीएनजी	Additional Secretary, P&NG
अपर सचिव एवं वित्त सलाहकार	Additional Secretary & Financial Advisor
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संयुक्त सचिव (एक्सप्लोरेशन व बायो रिफाइनरी)	Jt. Secretary (Exploration **&** Biorefinery
संयुक्त सचिव (जीपी)	Jt. Secretary (GP)
संयुक्त सचिव (जी)	Jt. Secretary (G)
उप महानिदेशक, (इ एवं एस)	Deputy Director General (E&S)
संयुक्त सचिव (आईएफडी)	Jt. Secretary (IFD)
संयुक्त सचिव (आईसी)	Jt. Secretary (International Cooperation)
डी जी एच: महानिदेशक (डी जी एच)	**DGH:** DG, DGH
ओ आई डी बी : सचिव (ओ आई डी बी)	**OIDB:** Secretary (OIDB)
नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग	**NITI Aayog:** Advisor (Energy), NITI Aayog
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निदेशक (मार्के.), आईओसी/ बीपीसी/ एचपीसी/ गेल	Director (Mkt.), IOC/ BPC / HPC /GAIL
प्रेजिडेंट, आरआईएल / एमडी और सीईओ, एच एम ई एल / सीईओ (मार्के.) नयारा एनर्जी	President - RIL, MD & CEO – HMEL, CEO (Mktg.) – Nayara Energy
महानिदेशक, फिपी	DG, FIPI
प्रबंध निदेशक-एनआरएल, गुवाहाटी/सीपीसीएल, चेन्नई/एमआरपीएल, मंगलुरु	MD- NRL, Guwahati/ CPCL, Chennai/ MRPL, Mangalore
ओएमसी योजना एवं रिटेल ग्रुप – एचओ	OMCs Planning & Retail Groups – HO

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

Subject: Industry Consumption Review Report of PPAC: Aug 2025

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

डॉ पंकज शर्मा
अपर निदेशक (मांग एवं आर्थिक अध्ययन)-प्रभारी
Dr Pankaj Sharma
Additional Director (Demand & Economic Studies)-I/c

Highlights of the month: Aug 2025

- Indian Oil Corporation Ltd. (IndianOil) has become the first in the country to receive the prestigious ISCC CORSIA Certification for Sustainable Aviation Fuel (SAF) production at Panipat Refinery. The certification, a prerequisite for commercial SAF production, represents a significant advancement in India's capability for the production, certification and distribution of SAF.

- Cabinet approves Rs 30,000 crore as compensation to Public Sector Oil Marketing Companies for losses in Domestic LPG

- BPCL gets clearance to draft ToR for ₹1.03 lakh crore refinery-petrochem project in AP

- Natural gas company GAIL (India) and ethanol producer TruAlt Bioenergy have announced an investment of $72 million to set up Compressed BioGas (CBG) plants through a joint venture.

- The government is planning to further ease the requirements for establishing petrol pumps in India, aligning its policies with the evolving energy security strategy and its ongoing commitment to decarbonization .

- ONGC starts sale of 1 SCMD natural gas from Chinnewala Tibba block covers an area of 73 sq. km and holds promising gas reserves

- The Ministry of Petroleum and Natural Gas issued a comprehensive statement on August 4, 2025, addressing concerns about the effects of 20% Ethanol Blended Petrol (E-20) on vehicle mileage and longevity

- Hon'ble Prime Minister Modi inaugurated Maruti Suzuki's e-Vitara exports from Gujarat, marking a significant step towards India's self-reliance in green mobility

- Oil and Natural Gas Corporation Limited (ONGC), is investing over ₹4,600 crore to develop oil and gas reserves in Konaseema district of Andra Pradesh .

- RBI kept its key repo rate steady at 5.50% as policymakers waited to see the impact of recent rate cuts amid rising global trade uncertainties.

- All India Consumer Price Index (CPI) for the month of August, 2025 over August, 2024 is 2.07%

- GST collection for Aug 25 remained Rs 1.86 lakh crore, 6.5% higher than the same period last year .

- India's manufacturing PMI rose to 59.3 in August 2025 from 59.1 in July, marking a 17-year high, driven by strong domestic demand, robust new orders, and rapid expansion in production.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in Aug 2025 with a volume of 18.73 MMT registered a growth of 2.6% against the historical of 18.26 MMT in Aug 2024.

2. MS (Petrol) consumption during the month of Aug 2025 with a volume of 3.54 MMT (1.02 mbpd) recorded a growth of 5.5% on the volume of 3.36 MMT (0.96 mbpd) in Aug 2024.

3. 'Ethanol blending in Petrol was 19.8% during Aug'25 and cumulative ethanol blending during November 2024- Aug'2025 was 19.1%.

4. The Domestic Sale of Passenger Vehicles in Aug 2025 with a volume of 3.23 lacs registered Flat growth of 0.93 % over Aug 2024, as per FADA . Slight slowdown oberseved in sales of PV on account of customer delaying the purchase expecting GST reduction in automobile sector .

5. HSD (Diesel) consumption during the month of Aug 2025 with a volume of 6.58 MMT (1.61 mbpd) registered growth of 1.2% over the volume of 6.50 MMT (1.60 mbpd) in the month of Aug 2024.

6. LPG consumption during the month of Aug 2025 with a volume of 2.81 MMT registering a growth of 5.4% over the volume of 2.66 MMT in Aug 2024. LPG has been growing since last year riding on growth in PMUY segment.

7. ATF consumption during Aug 2025 with a volume of 0.71 MMT register a de-growth of 2.9%, over a volume of 0.73 MMT during the month of Aug 2024.

8. Bitumen consumption during Aug 2025 with a volume of 0.42 MMT registered a growth of 47.1% over the volume of 0.29 MMT in the month of Aug 2024.

9. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 0.9% in Aug 2025 as compared to Aug 2024. SKO consumption during the month is largely constituted by PDS category with a 68% share.

10. 'Total Natural Gas Consumption (including internal consumption) for the month of August 2025 was 5822 MMSCM which was 3.8% lower than the corresponding month of the previous year. The cumulative consumption of 28705 MMSCM for the current financial year till August 2025 was lower by 7.9% compared with the corresponding period of the previous year.

11. As on 31th Aug'2025, number of active LPG domestic connections are 33.11 cr and PMUY connections 10.33 cr

This report analyses the trend of consumption of petroleum products in the country during the month of Aug 2025. Data on product-wise monthly consumption of petroleum products for Aug 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 Aug 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-August 2025

Product	August				April-August			
	2024	2025	% share of August'25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-Aug'25
(A) Sensitive Products								
LPG	2664	2807	15.0	5.4	12415	13349	7.5	13.4
SKO	35	34	0.2	-0.9	169	176	4.3	0.2
Sub Total	**2698**	**2841**	**15.2**	**5.3**	**12584**	**13525**	**7.5**	**13.6**
(B) Major Decontrolled Product								
HSD	6501	6576	35.1	**1.2**	38013	38899	**2.3**	39.0
MS	3360	3544	18.9	**5.5**	16701	17791	**6.5**	17.9
Naphtha	1156	1107	5.9	**-4.3**	5701	4971	**-12.8**	5.0
ATF	732	711	3.8	**-2.9**	3651	3698	**1.3**	3.7
Bitumen	286	421	2.2	**47.1**	3213	3300	**2.7**	3.3
FO/LSHS	498	519	2.8	**4.2**	2734	2471	**-9.6**	2.5
Lubes+Greases	341	365	1.9	**6.9**	1941	1881	**-3.1**	1.9
LDO	80	80	0.4	**0.7**	319	419	**31.4**	0.4
Sub Total	**12954**	**13323**	**71.1**	**2.9**	**72274**	**73429**	**1.6**	**73.7**
(C) Other Minor Decontrolled Products								
Pet.Coke	1725	1726	**9.2**	**0.0**	9153	8381	**-8.4**	**8.4**
Others*	884	839	**4.5**	**-5.0**	5673	4326	**-23.7**	**4.3**
Sub Total	**2609**	**2565**	**13.7**	**-1.7**	**14826**	**12706**	**-14.3**	**12.7**
Total	**18261**	**18729**	**100**	**2.6**	**99684**	**99660**	**0.0**	**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 Jul'25-Aug'25, which may undergo change on receipt of actual data), and

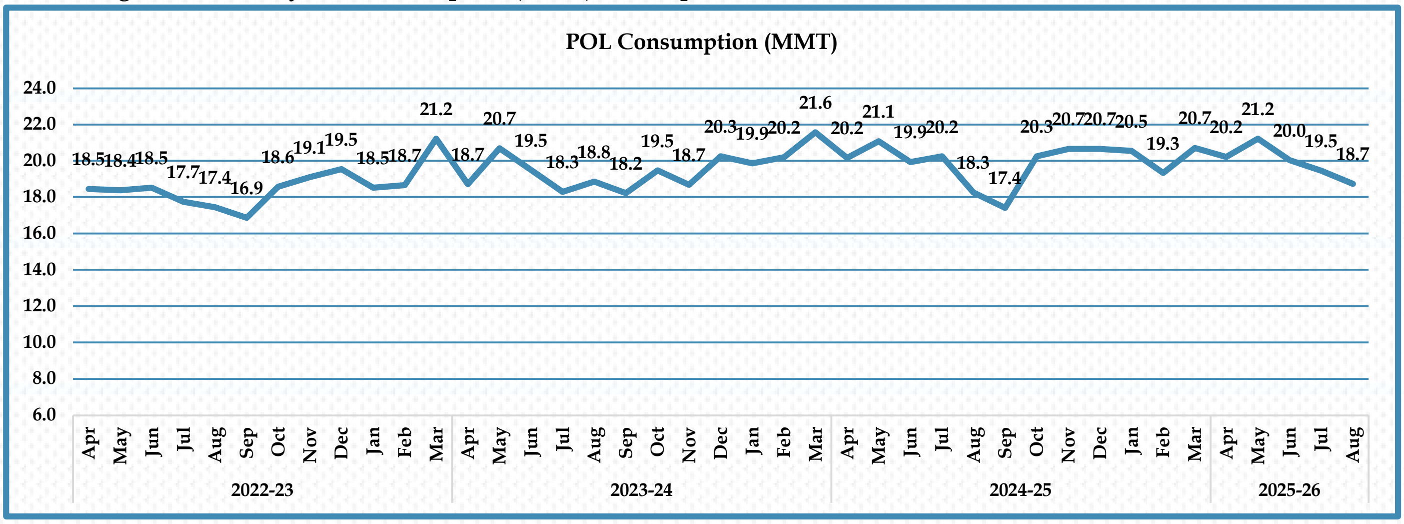
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

Overall consumption of all petroleum products in Aug 2025 with a volume of 18.73 MMT growth by 2.6% over the volume of 18.26 MMT in Aug 2024. Growth in the POL was driven by growth in MS at 5.5%, LPG at 5.4% and HSD at 1.2%.

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.

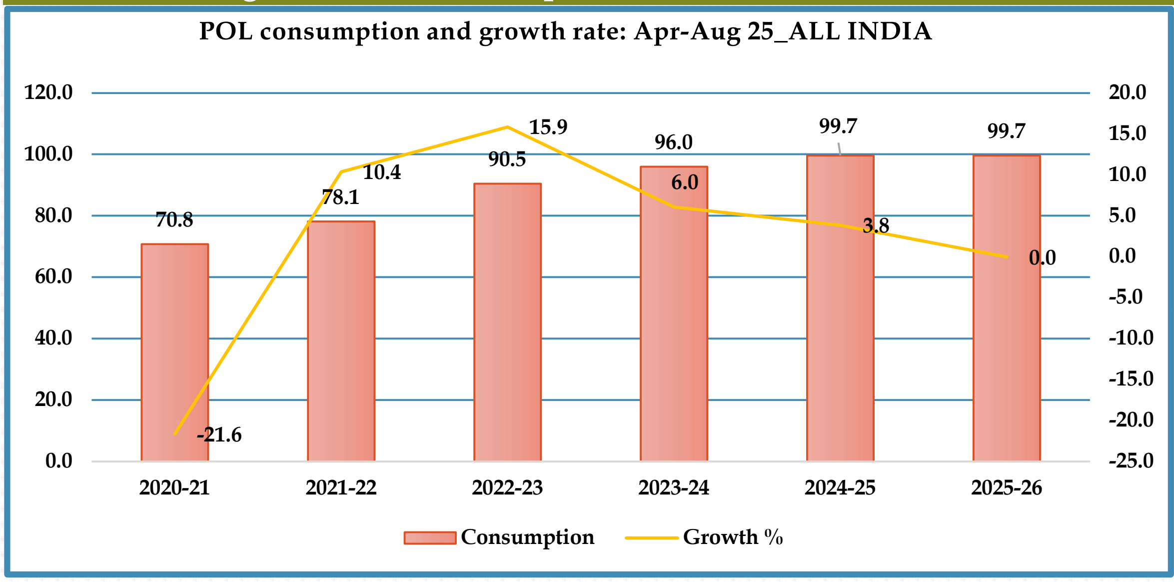
Pan India based domestic POL monthly consumption trend since April-2022 is shown in Figure-A.

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



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

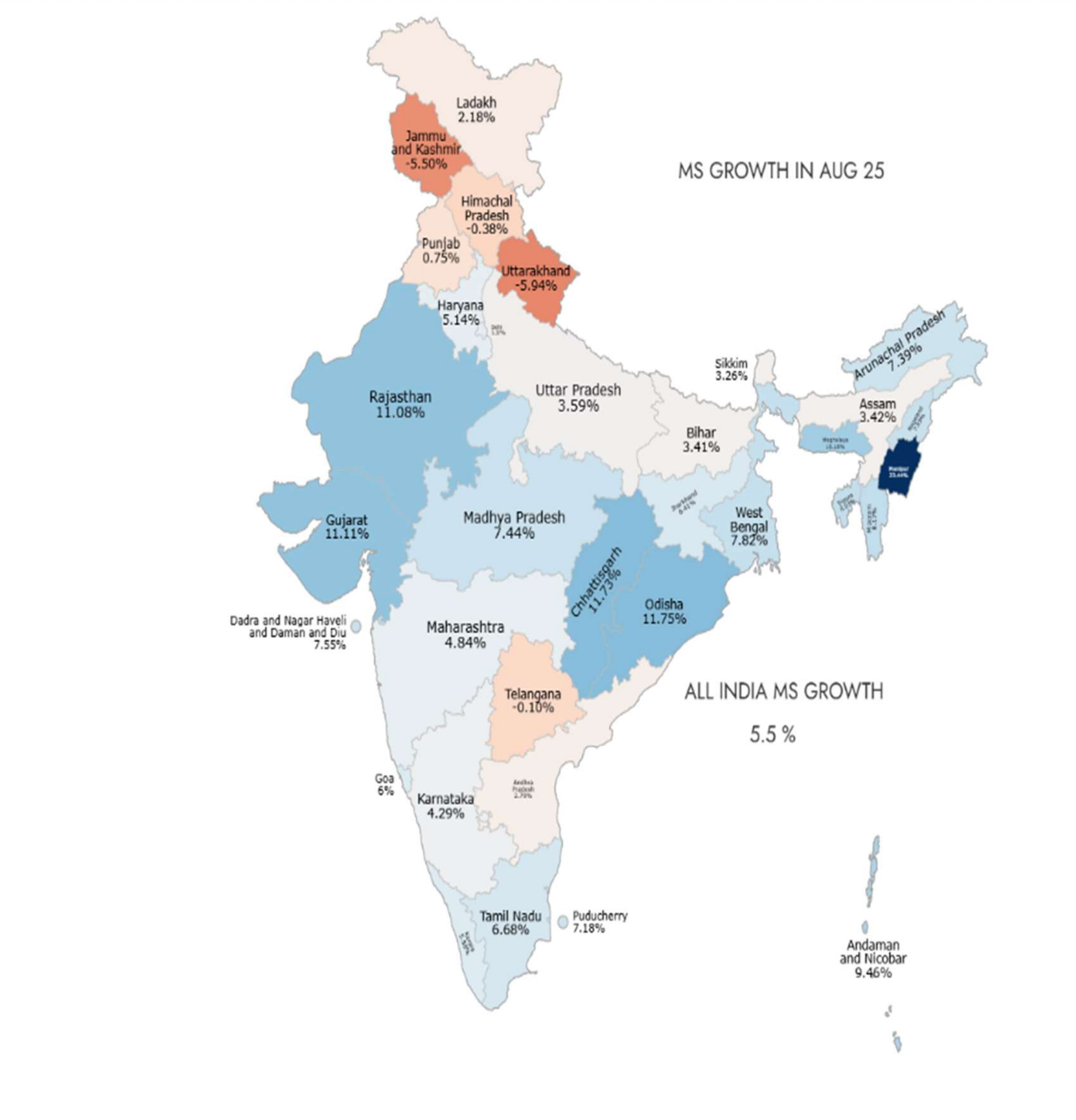
MS (Petrol) consumption during the month of Aug 2025 with a volume of 3.54 MMT recorded a growth of 5.5% on the volume of 3.36 MMT in Aug 2024. Cummutively MS is growing at 6.5 % from Apr-Aug 25 period

PSU's registered a growth rate of 4.6% as against 14.4% achieved by their private sector counterparts in Aug-25. Market share held by PSU reduced by 0.76% (90.25% 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:

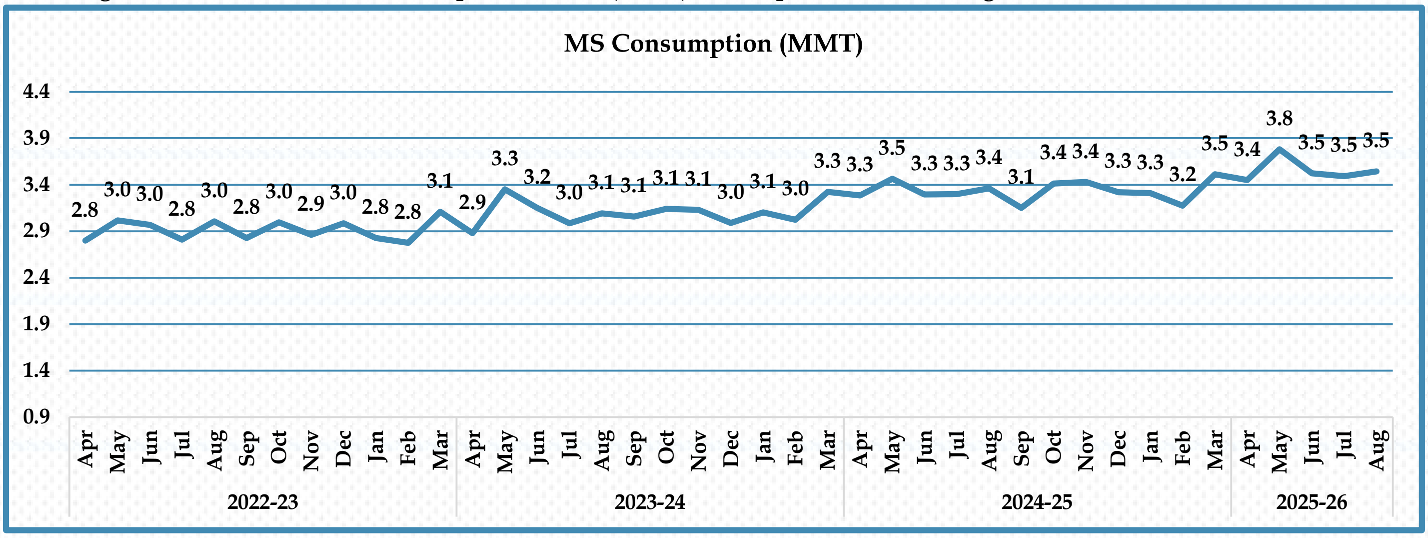
- Increase in Vehicle ownership is contributing in the MS growth. As per FADA report, from Apr - Aug 25 new registration of 75 lacs 2W and 16.4 lacs PV happened and are growing at 2.41% & 2.64 % respectively during the Apr-Aug 25 period.
- The impact of excess rainfall observed in states of Punjab / HP/ Uttarakhand / Jammu & Kashmir which has shown negative growth in Aug 25. Big States like Gujrat & Rajasthan have shown a double digit growth and has contributed in the growth of MS in Aug 25
- Increased private mobility and disposable income continues to drive MS growth.

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



Factors impacting consumption of MS:
Passenger Vehicle Sales:

The Sale of Passenger Vehicles in Aug 2025 at 3.23 lacs registered 0.9% growth YoY basis over sale of 3.20 lacs in the month of Aug 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 Aug 2025 (Primary sales data)

Vehicle Segment	Aug 25		
	2024	**2025**	**Growth %age**
Total PV	320,291	323,256	0.9%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in Aug 2025 with a volume of 13.74 lacs registered 2.2 growth, YoY basis over volume of 13.44 lacs during Aug 2024, as shown in the following table-3.

Three-Wheeler sales

Three-wheeler domestic sales in Aug 2025 with a volume of 1.05 lac recorded a de-growth of 2.3%, YoY basis over the volume of 1.3 lac in Aug 2024, as shown in the following table-3

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

Vehicle Segment	Aug'25		
	2024	**2025**	**Growth %age**
Total Two Wheelers	1,344,380	1,373,675	2.2%
Passenger Carrier-3 wheeler	48,012	50,100	4.3%
Goods Carrier-3 wheeler	8,651	9,697	12.1%
E-Rickshaw	44,346	36,969	-16.6%
E-cart	4,396	6,213	41.3%
Total Three Wheelers	105,405	102,979	-2.3%

Source: FADA

High Speed Diesel (HSD):

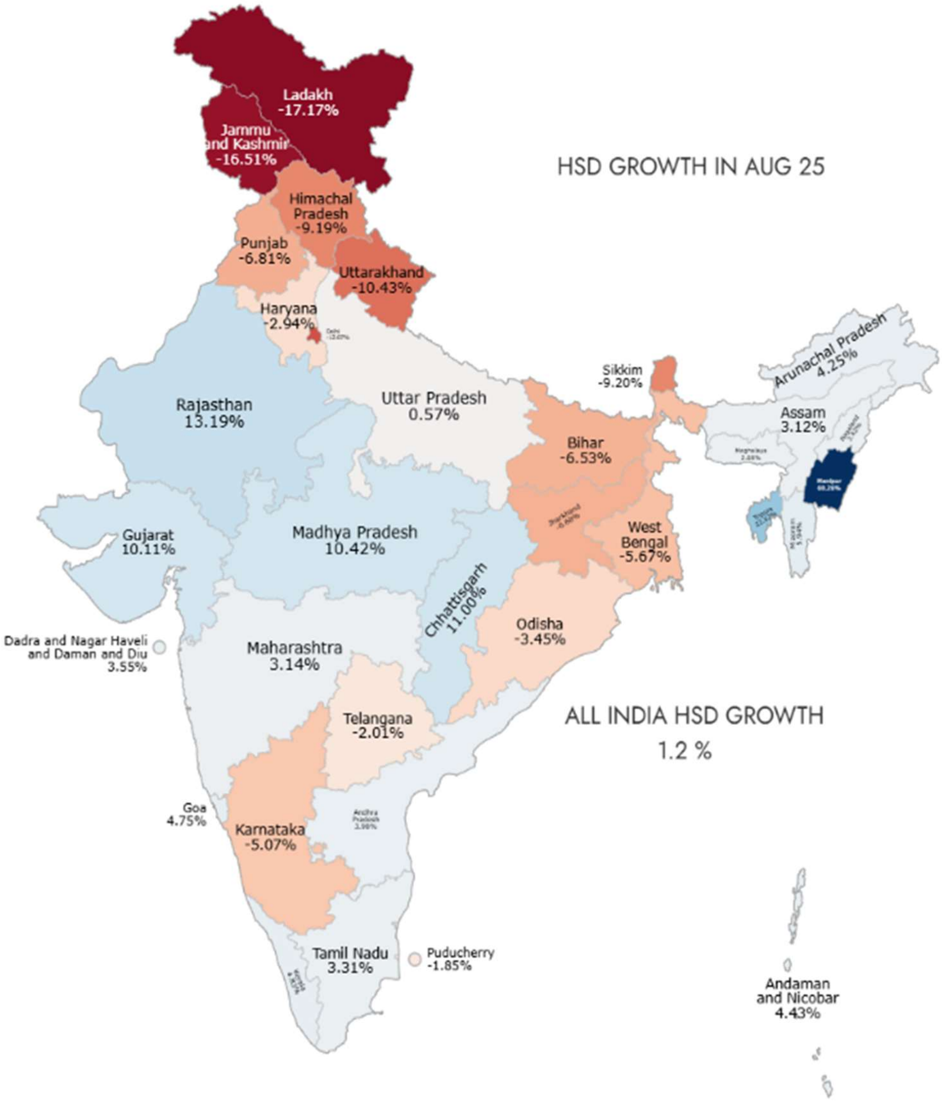
HSD (Diesel) consumption during the month of Aug 2025 with a volume of 6.58 MMT, registered a growth of 1.2% on the volume of 6.50 MMT in the month of Aug 2024.

- PSU's registered a 0.9% growth their private sector counterparts in the month of Aug-25.
- **Market share held by PSU reduced by 1.53% (87.17% 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 11 % in Apr-Aug 25. Retail segment grew at 1 % in the same period. HSD consumption in Major sectors like Manufacturing showing healthy growth during Apr -Aug 25 period increasing the overall freight movement.
- The demand for diesel is greatly impacted by excess rainfall in most of North India including J&K, HP, Punjab, Haryana UK, alongwith South india except kerala, affecting mobility for tourism and freight movement in these places. Industrial activity has also been affected due to normal to excess rainfall in most of the Country except central india.
- Except Karnataka & Telangana, southern states are growing above all India growth .
- 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 Aug-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

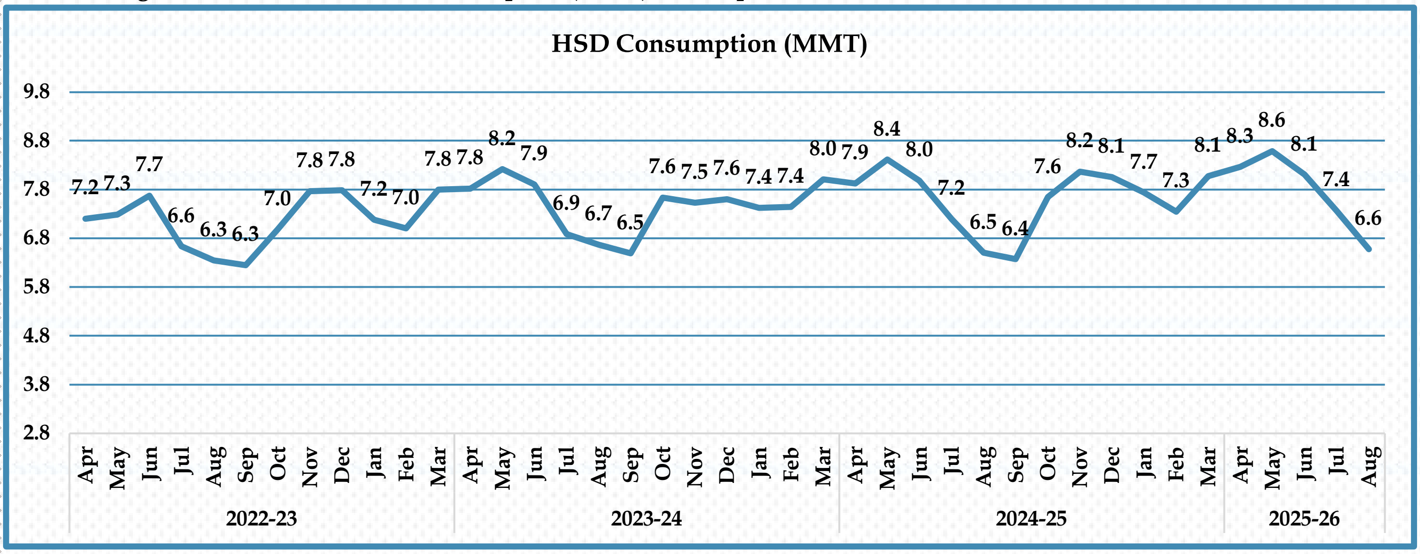
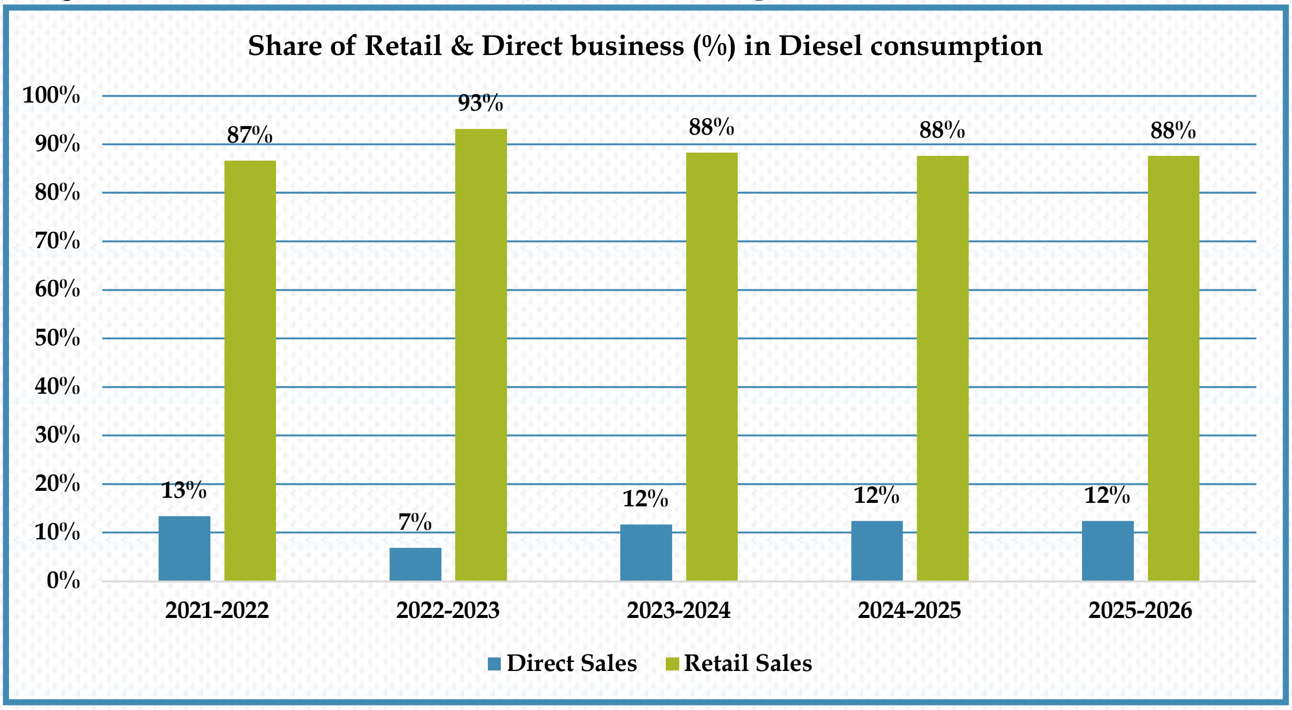
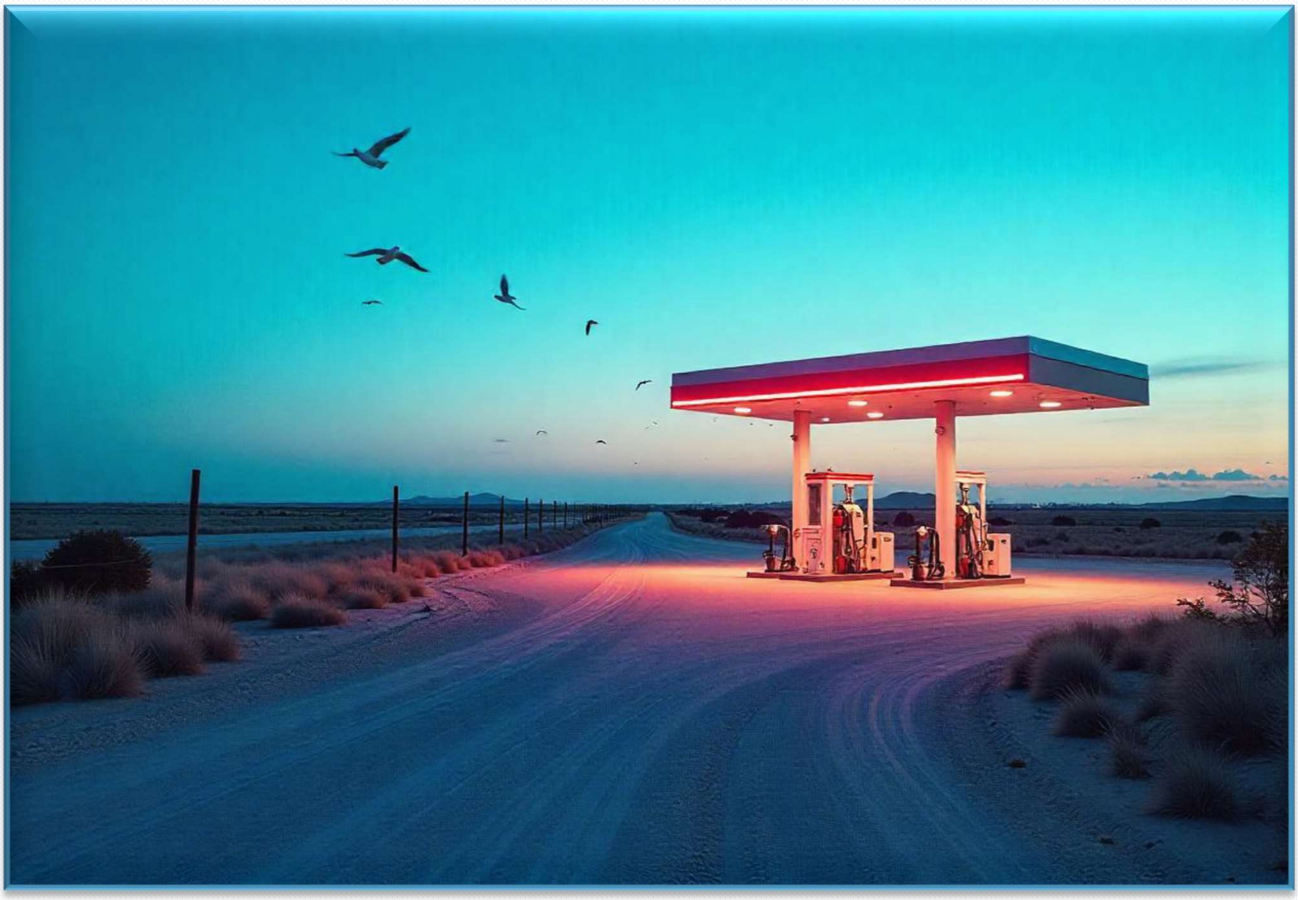


Figure-G: Share of Retail & Direct business (%) in Diesel consumption





Factors impacting consumption of HSD:

Weather

Northern India: Delhi recorded its wettest August in 15 years (≈400 mm). Punjab faced severe flooding, submerging over 1,400 villages. Heavy rains caused disruptions but also cooled conditions.

Eastern & Northeastern India: Rainfall remained below normal for much of the month, especially in the Northeast. Early-month weakness in the monsoon limited water availability.

Central India: Monsoon revival brought above-normal rains in the second half of August, improving reservoir levels and crop prospects.

Northwestern India: The region saw its heaviest August rainfall since 2001, easing earlier deficits but causing local flooding in some districts.

Southern Peninsula: Heavy mid-August rains lashed Tamil Nadu, Kerala, and Karnataka. Despite this revival, some southern pockets still recorded below-normal seasonal totals.

Overall Summary: August 2025 delivered one of the strongest monsoon spells in recent decades. While Northwest and parts of Central and Southern India saw surplus rainfall, the East and Northeast continued to lag behind. Floods in Punjab and record rainfall in Delhi contrasted with persistent shortfalls in the Northeast, highlighting the uneven nature of the monsoon's impact.

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

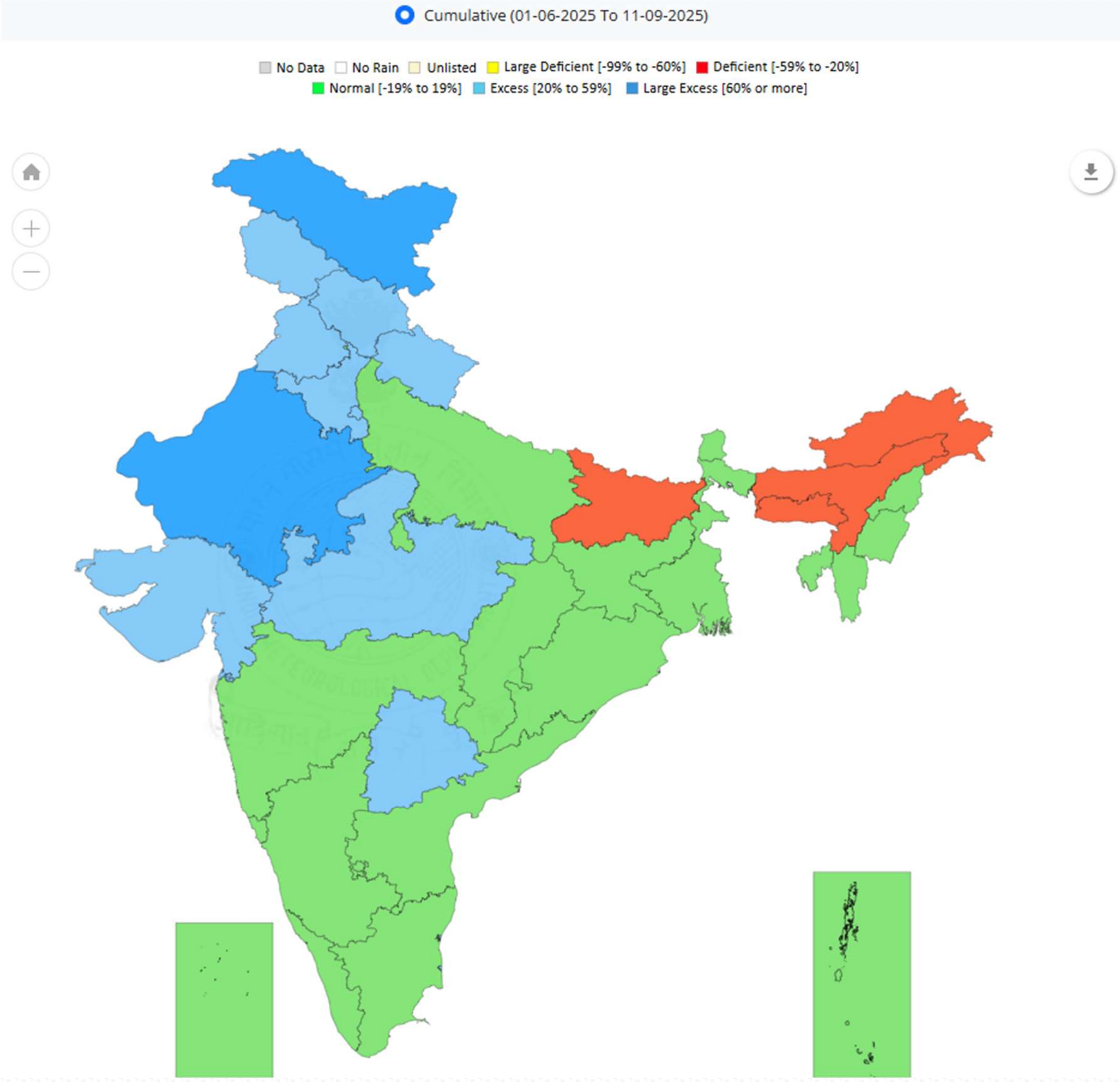


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

(No of Eway Bills Generated in Lakhs)

Month	Aug-25	Aug -24	Variance	Apr-Aug 25	Apr-Aug 24	Growth
Intra State	847.94	676.81	25%	4,073.79	3,305.43	23.2%
Inter State	443.41	377.94	17%	2,150.44	1,797.15	19.7%
Total	**1,291.35**	**1,054.75**	**22%**	**6,224.24**	**5,102.58**	**22.0%**

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 8.6% as compared to Aug 2024 as shown in Table-5

Tractor Sale:

Tractor domestic sales in Aug 2025 with a volume of 85215 registered a robust growth of 30.1% over the volume of 65477 in Aug 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		Aug'25		
		2024	2025	Growth %age
CV	LCV	42,672	46,156	8.2%
CV	MCV	5,742	6,970	21.4%
CV	HCV	21,159	22,412	5.9%
CV	Others	62	54	-12.9%
Total CVs		**69,635**	**75,592**	**8.6%**
Tractors		65,477	85,215	30.1%

Source: FADA research

The high growth of 30% in Tractor sales in August'25 and cumulative 12% during the period Apr-Aug'25 are projected to drive demand in the agriculture sector in the upcoming Rabi season.

Port Traffic:

The Major Ports achieved cargo throughput of 364.43 MMT during April-Aug'2025 which is 4.67% higher over same Period last year.

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

Ports	Apr-Aug'25	Apr-Aug'24	Growth (%)
Kolkata & Haldia	28236	24337	16.02
Paradip	64653	62594	3.29
Visakhapatnam	35409	35767	-1.00
Kamarajar (Ennore)	19972	19723	1.26
Chennai	24763	22700	9.09
V.O. Chidambaranar	17890	17467	2.42
Cochin	16055	15988	0.42
New Mangalore	18149	17425	4.15
Mormugao	7871	7093	10.97
Mumbai	28871	28321	1.94
JNPA	41270	37424	10.28
Deendayal	61291	59334	3.30
Total:	**364430**	**348173**	**4.67**

POWER SITUATION:

India's peak demand for power degrew to 242.77 gigawatt (GW) in Apr-Aug'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-Aug'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-Aug 2025)

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Defcits(-)		Peak Demand	Peak Met	Surplus(+) / Defcits(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	594,104	591,972	-2,132	-0.4%	203,014	200,539	-2,475	-1.2%
2022-23	664,149	659,092	-5,057	-0.8%	215,888	207,231	-8,657	-4.0%
2023-24	700,574	698,605	-1,969	-0.3%	238,824	236,295	-2,529	-1.1%
2024-25	746,700	745,580	-1,120	-0.1%	249,856	249,854	-2	0.0%
2025-26	749,049	748,821	-228	0.0%	242,773	242,493	-280	-0.1%

SECTORAL CONSUMPTION OF HSD:

During 'April-Aug-25, HSD total consumption with a volume of 38.90 MMT registered 2.3%growth Year-on Year basis over the volume of 38.01 MMT in 'April-Aug-24.

88% of HSD consumption during 'April-Aug-25', was constituted by retail sales. Balance 12% falls under direct sales category as shown in I(I/II) figure. The bifurcation was 88:12 in 'April-Aug-24' also after direct sales volume recovering back.

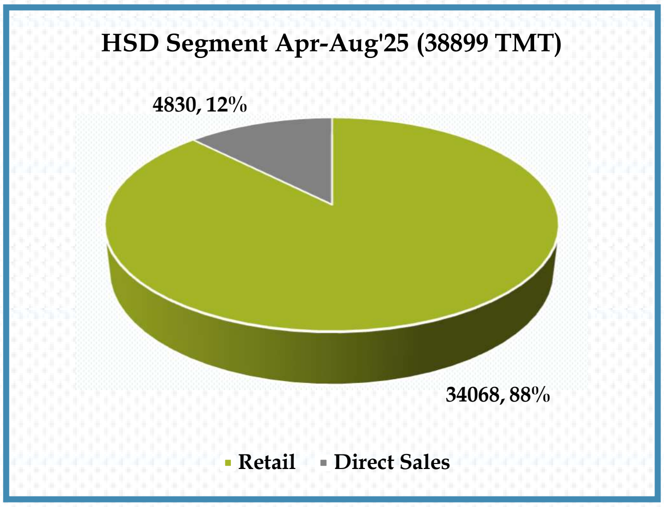
Growth of 2.3% during Apr-Aug'25 was driven by increased economic activity & freight movement, evident by a 22 % jump in Total E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for April-Aug-25' 'Road Transport' was 20%, the highest share followed by Mining 13%, Manufacturing at 12%, Shipping 6%, Agriculture 2% and Power Generation 2%. Railways share dropped from 13% to 10%. 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-Aug'25 and its comparison with April-Aug'24



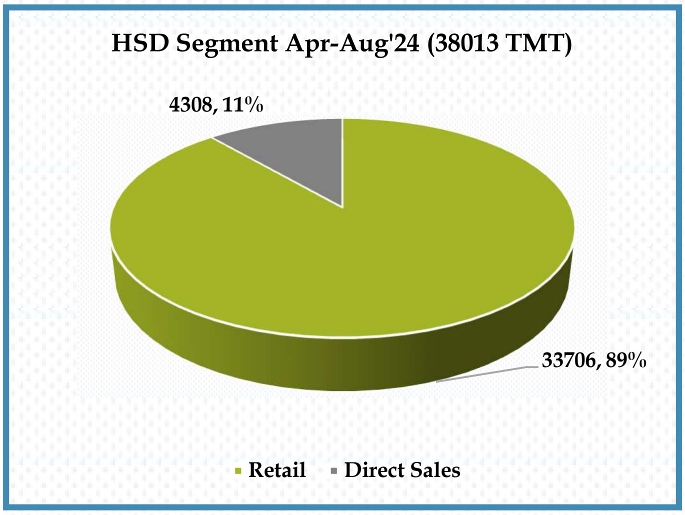
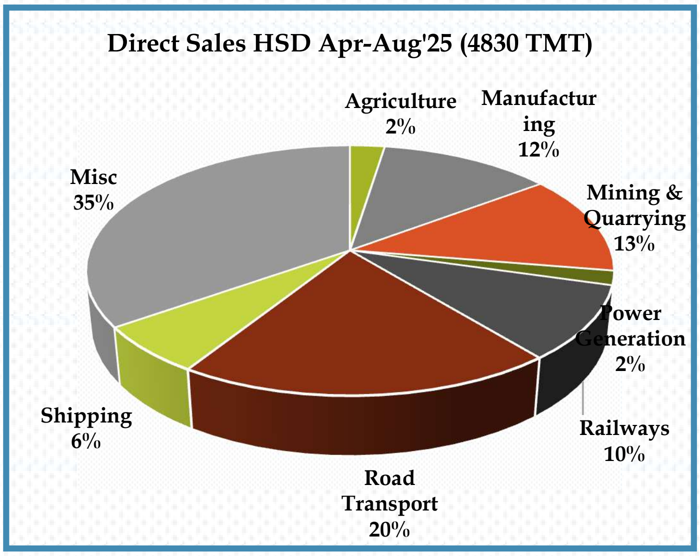
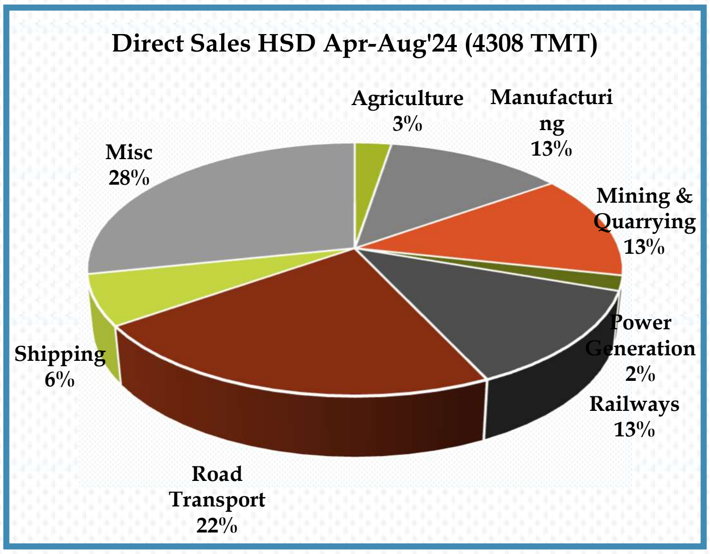


Figure-I(II): Sectoral HSD consumption Breakup in April-Aug'25 and its comparison with April-Aug'24





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 increased to 13%. 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 0.03 MMT registered a de-growth of 0.9% in Aug 2025 as compared to Aug 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 68% & 32% respectively for the month Aug 2025 as shown in the following figure-J.

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

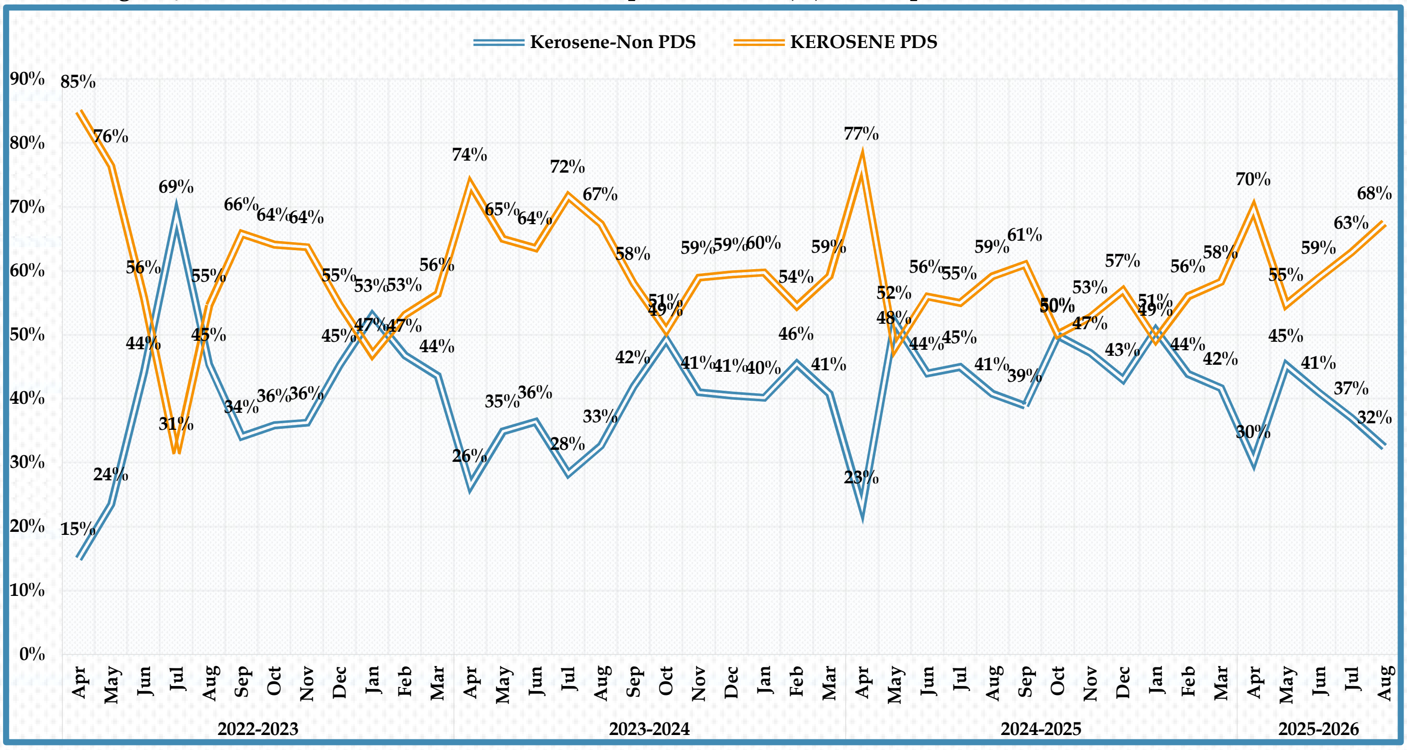
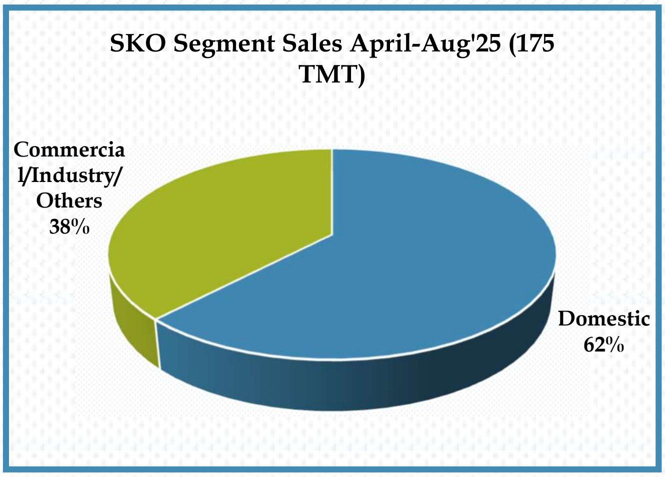
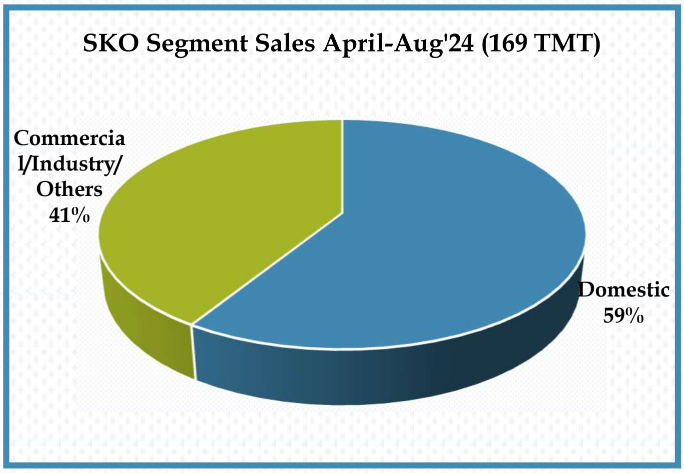


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene





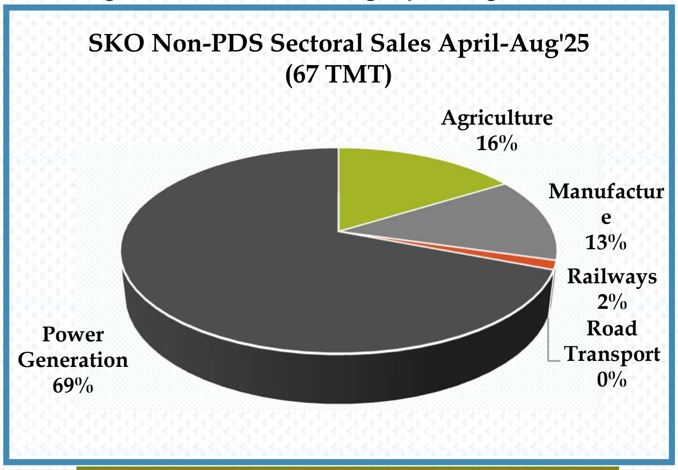
Sectoral consumption of SKO:

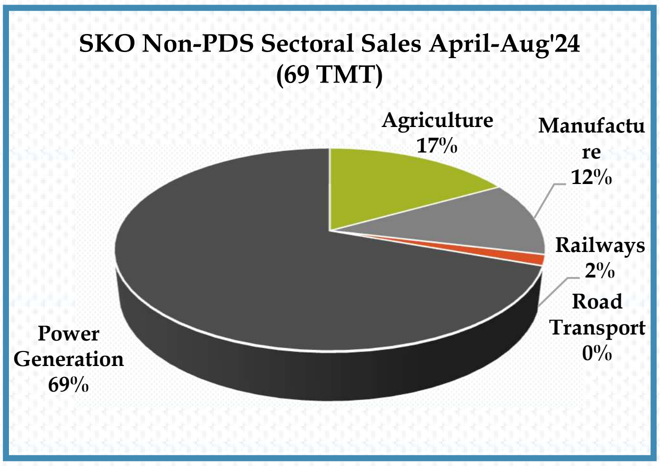
Out of total SKO sales during 'April-Aug'25 'PDS subsidized SKO' upliftment constituted to 62%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 16% share, Manufacturing 13%, and Miscellaneous applications at 69%.

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



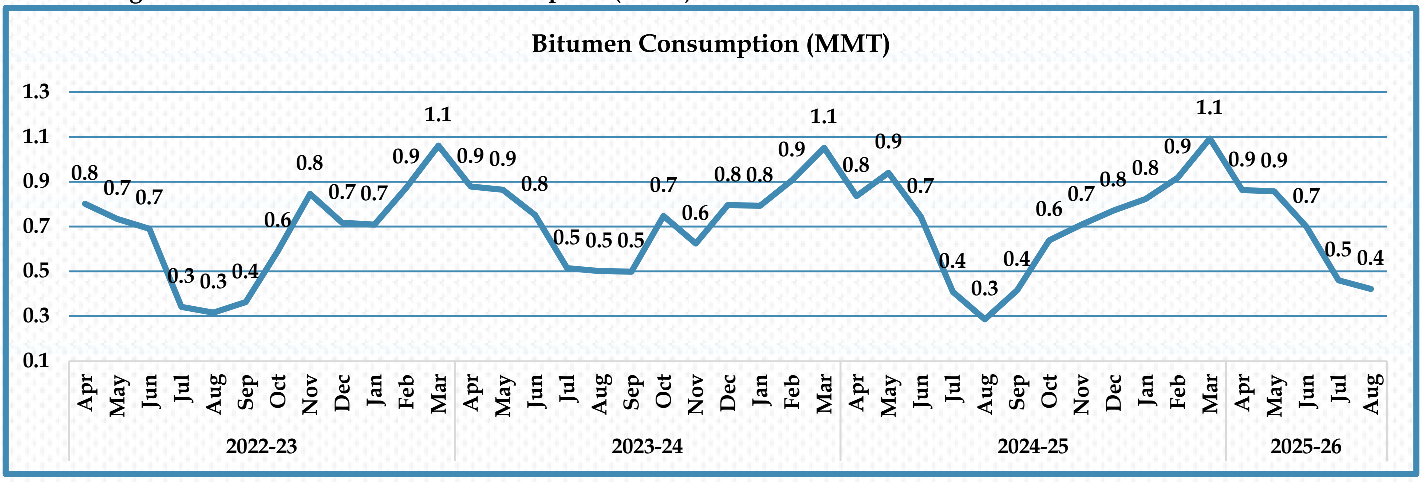


BITUMEN:

Bitumen consumption during Aug 2025 with a volume of 0.42 MMT registered growth of 47.1% over the volume of 0.29 MMT in the month of Aug 2024. Import of Bitumen is also increased by 49 % in Aug 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-Aug-25, total bitumen consumption with a volume of 3.30 MMT registered a growth of 2.7% Year-on Year basis over the volume of 3.21 MMT in 'April-Aug-24.

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

LPG:

LPG consumption during the month of Aug 2025 with a volume of 2.81 MMT registered growth in the month at 5.4% over the volume of 2.66 MMT in the month of Aug 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 87.1 % in Aug 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. 3.7% growth in Packed domestic LPG consumption in Aug'25 as compared to Aug'24.
2. Growth of 7.8% in non-domestic packed segment is due price advance of 19kg cyl in Aug'25 (Rs. 1631.5) as compared to Aug'24 (1752.5).
3. Under PMUY scheme 10.33 crores beneficiaries at the end of Aug 2025.
4. As on 1.08.2025, total active domestic connections in India are 3311.2 lakhs

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

   - PMUY growth 9.1% wherein OMCs-wise %growth as contributed by 11.6% (HPC), 9.5% (IOC) & 5.9% (BPC).

   - As of now, more than ~65.6% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG

   - consumption. New connections ~93.5% issued with DBCs in Aug'25 (including SBC to DBC conversion).

5. 17.1 Crs cylinders of 14.2kg (~55.2 lacs/day) were delivered in Aug`25 compared to 16.5 Crs in Aug`24.

6. Growth of 65.5% 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 Aug'25 Rs. 71.4/kg as compared to Jul'25 (Rs. 72.9/kg) & Aug'24 rate was Rs. 70.8/kg.

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

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

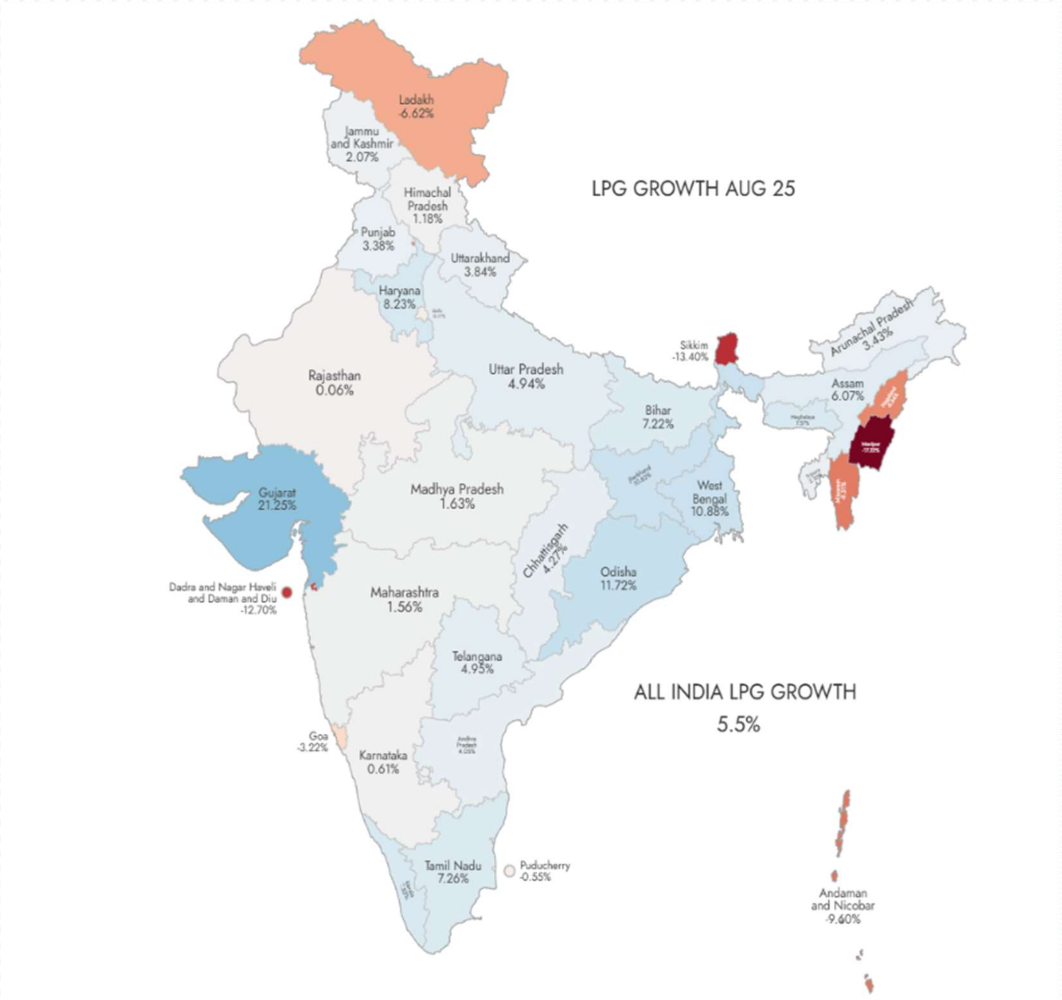
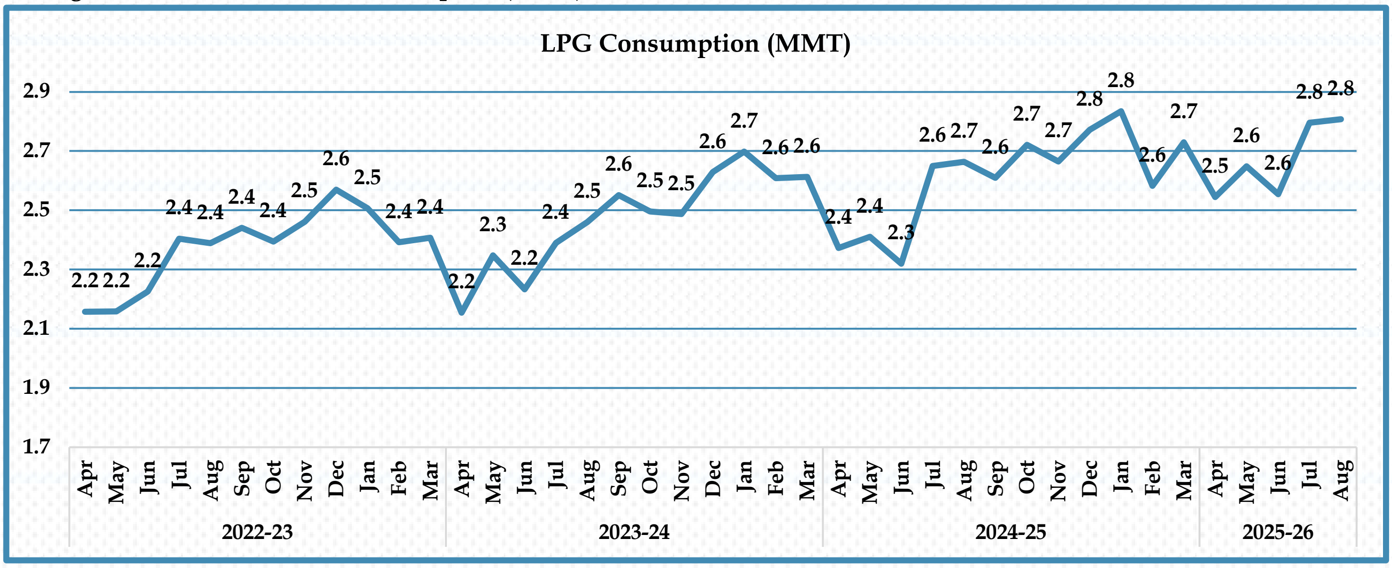


Figure-O: Month-wise LPG consumption (MMT)

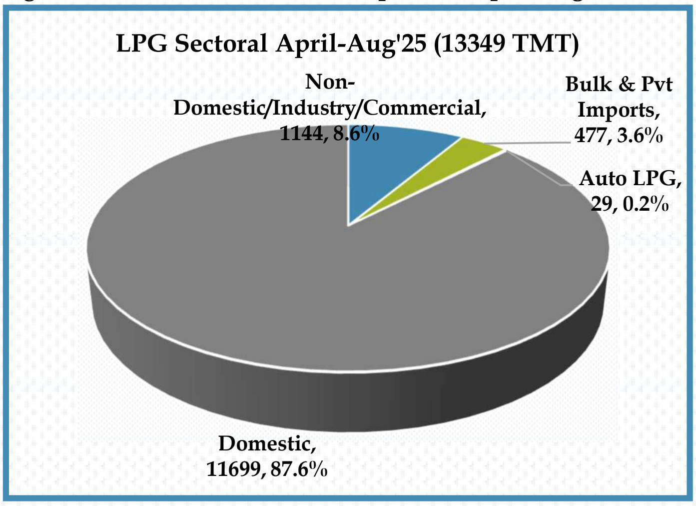


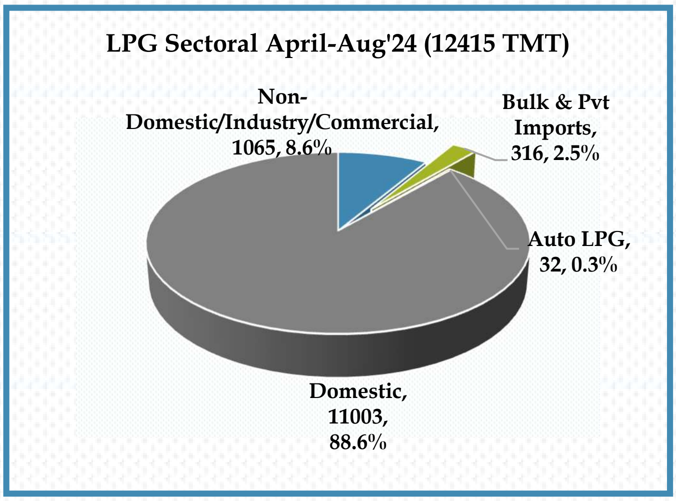
Sectoral consumption of LPG:

During 'April-Aug-25, total LPG domestic consumption with a volume of 13.35 MMT registered 7.5% growth Year-on Year basis over the volume of 12.42 MMT in 'April-Aug-24.

The Sectoral LPG consumption during 'April-Aug-25', was driven by Domestic packed at 87.6%, followed by LPG 'non-domestic/ industry/ commercial sector 8.6% & Bulk at 3.6%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

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





Naphtha:

Naphtha consumption during Aug 2025 with a volume of 1.11 MMT registered a de-growth of 4.3%, over a volume of 1.16 MMT during the month of Aug 2024.

Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-growth during the Aug 25 with reduced consumption in Petchem plants and reduction in the import of naptha by 61 % . Gujarat is major consumption , contributing 55 % to the total sales of naphtha in the country .

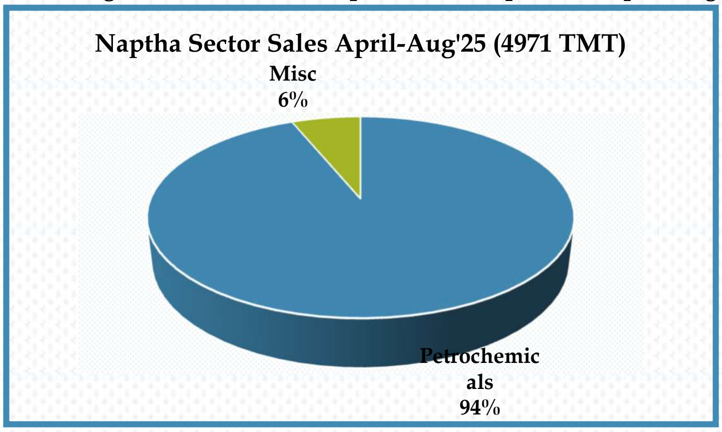
Sectoral consumption of Naphtha:

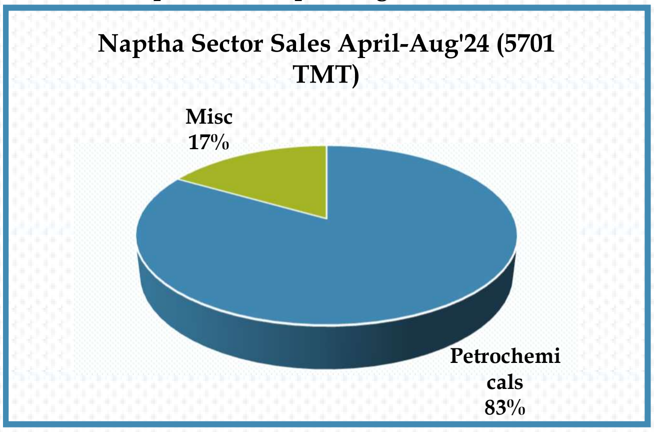
During 'April-Aug-25, total Naphtha domestic consumption with a volume of 4.97 MMT registered de-growth of 12.8% Year-on Year basis over the volume of 5.70 MMT in 'April-Aug-24.

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 'April-Aug-25 and its comparison to 'April-Aug-24



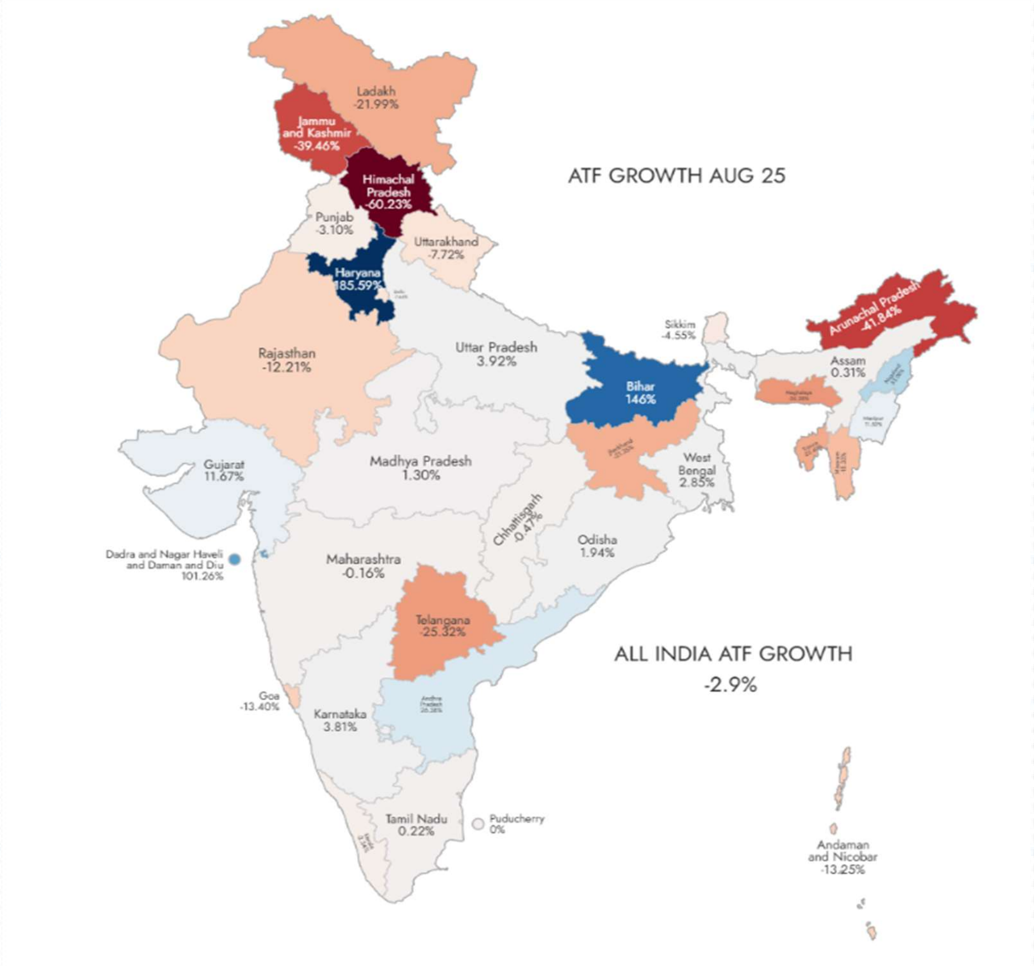


ATF:

ATF consumption during Aug 2025 with a volume of 0.71 MMT continued to registered a de-growth of 2.9%, over a volume of 0.73 MMT during the month of Aug 2024.

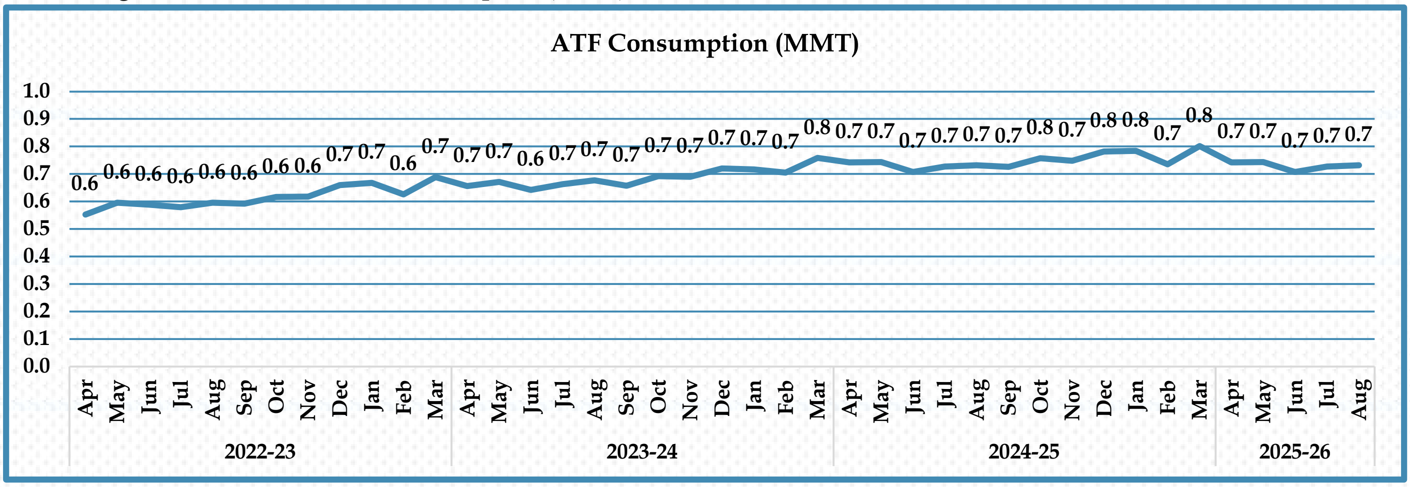
ATF registered a negative de growth of 2.9%, primarily due to the flight disruptions caused by heavy rainfall in the northern states coupled with aircarft downtime due to maintenance. Delhi & Maharastra which contributes more than 40 % to total ATF are both de growing in the month of Aug 25 . Flight operations were also impact at IGI due to runway is closed from June 15 to Sept 15 for upgradation .

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



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

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



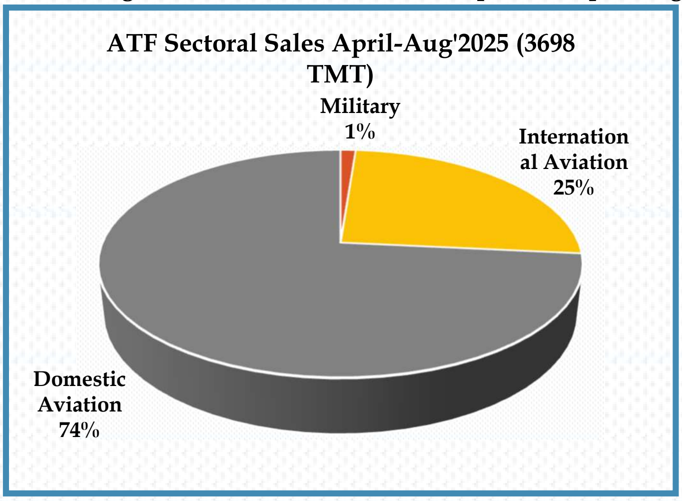
Sectoral consumption of ATF:

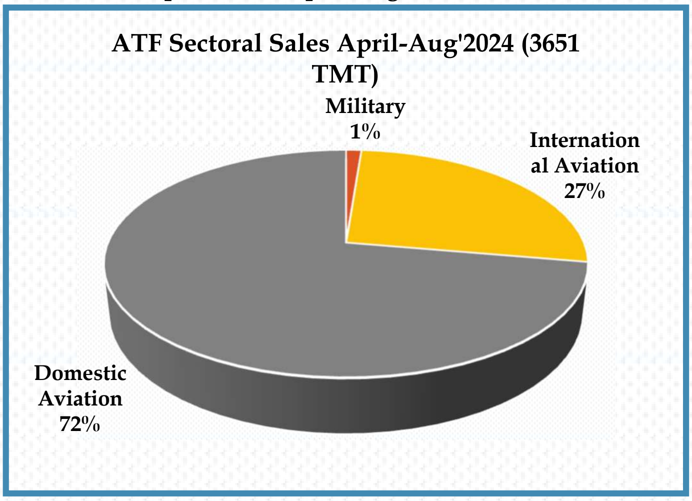
During 'April-Aug'25, total ATF domestic consumption with a volume of 3.70 MMT registered 1.3% growth Year-on Year basis over the volume of 3.65 MMT in 'April-Aug-24.

Almost entire ATF consumption during 'April-Aug-25 was attributed to aviation; 74% domestic aviation, 25% international aviation & 1% 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-Aug-25 and its comparison to 'April-Aug-24





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

During the month of July 2025, all operational airports (taken together) handled 228.62 thousand aircraft movements (excluding General Aviation Movements), 32.14 million passengers and 334.48 thousand tonnes of freight.

The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 6.7%, 2.5% and 3.2% respectively during (Apr-Jul) 2025-26 as compared to (Apr- Jul) 2024-25.

The International passengers traffic, domestic passengers and total passenger traffic have increased by 6.6%, 3.4% and 4.0% respectively during the period (April- July) 2025-26 as compared to (April- July) 2024-25.

The International freight traffic, domestic freight and total freight traffic have increased by 4.5%, 6.2% and 5.1% respectively during the period (April- July) 2025-26 as compared to (April- July) 2024-25.

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

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

CATEGORY	July		%
	2025-26	2024-25	CHANGE
Aircraft Movements (in '000)			
International	40.71	39.12	4.1
Domestic	187.91	193.43	-2.9
Total	228.62	232.55	-1.7
General Aviation	19.04	18.77	1.4
Grand Total(INTL+DOM+Gen)	**247.66**	**251.32**	**-1.5**

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								
July								
REGION				REGION				
	July		Change		July		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	22957	22440	2.3%	EASTERN	47	41	14.6%	-12.3%
NORTH EAST	7506	7859	-4.5%	NORTH EAST	14	14	1.2%	-5.7%
NORTHERN	47751	53221	-10.3%	NORTHERN	249	267	-6.7%	-3.6%
SOUTHERN	60111	59038	1.8%	SOUTHERN	225	229	-1.6%	3.4%
WESTERN	49588	50871	-2.5%	WESTERN	174	176	-1.0%	-1.5%
Total	**187913**	**193429**	**-2.9%**	**Total**	**710**	**726**	**-2.3%**	**-0.5%**

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 Aug 2025 with a volume of 0.519 MMT with a growth of 4.2% over the volume of 0.498 MMT in Aug-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 Aug 25
- Mining and Road transport sector shown healthy growth for FO/LSHS in the month Aug 25

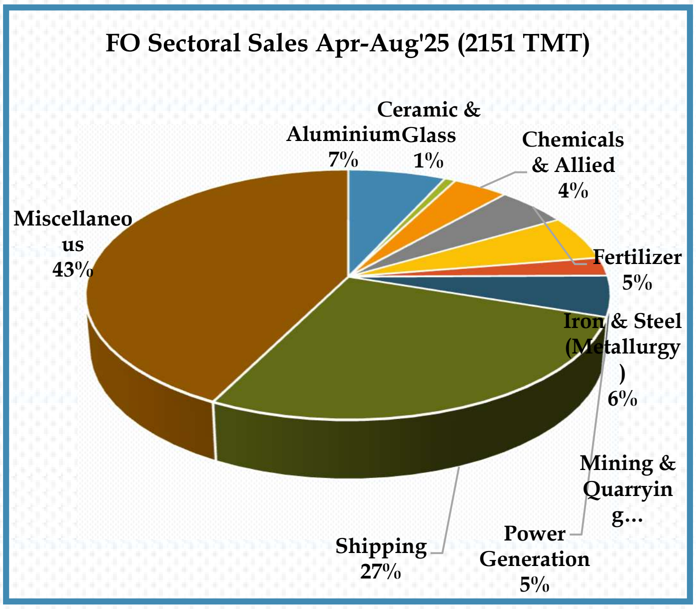
Sectoral consumption of FO/LSHS:

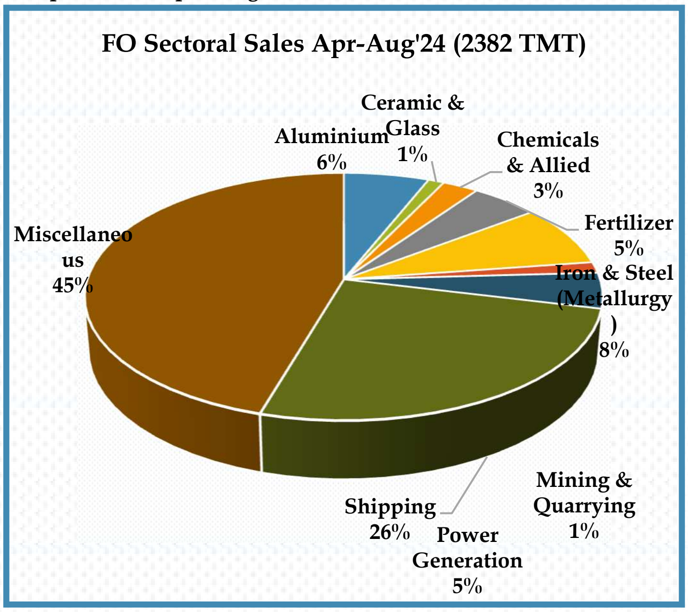
During 'April-Aug'25, total FO/LSHS consumption with a volume of 2.47 MMT with a de-growth of 9.6% Year-on Year basis over the volume of 2.73 MMT in 'April-Aug'24.

Further Product wise consumption for FO Apr-Aug'25 was 2.2 MMT vs 2.4 MMT in Apr-Aug'24 (9.7% de-growth). For LSHS, Apr-Aug'25 was 0.29 TMT vs 0.35 TMT in Apr–Aug'24 (16.6 % De-growth)

Details YoY comparisons are pictorially presented in the following figure.

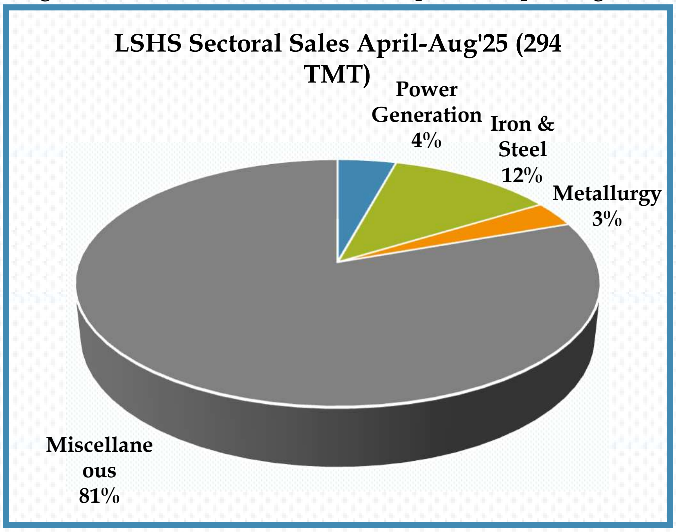
Figure-U: Sector wise FO+LSHS consumption of 'April-Aug'25 and its comparison to 'April-Aug'24

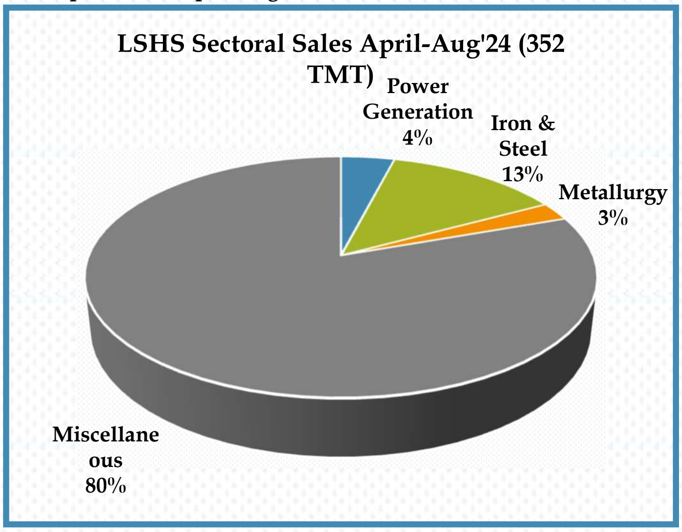




Apr-Aug'25:-	Apr-Aug'24:-
Shipping sector has a share of 27%, up from 26% from previous period, follow by Iron & steel, fertilizer and Aluminium.	Shipping contributes the highest share with 26% followed by Iron & Steel, Aluminiun Glass, Fertlizer & Power generation.

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





April-Aug'25:- Iron & Steel sector contributed to be the largest sector followed with 12% by Power Generation 4%	**April-Aug'24:-** Iron & steel contributes the highest share with 13% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of Aug 2025 with a volume of 1.73 MMT and de-growth of 0.0% over the volume of 1.73 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:-

- Cement industry is the major sector consuming petcoke. A de growth of -11.95% is observed in Pet coke on Y-0-Y comparison for Aug 25 in this sector .

- There is slight growth of 2.89 % in import of pet coke in Aug 25 which is one biggest growth driver of Pet coke . Around 60 % Pet coke is imported in the country in 2025-26.

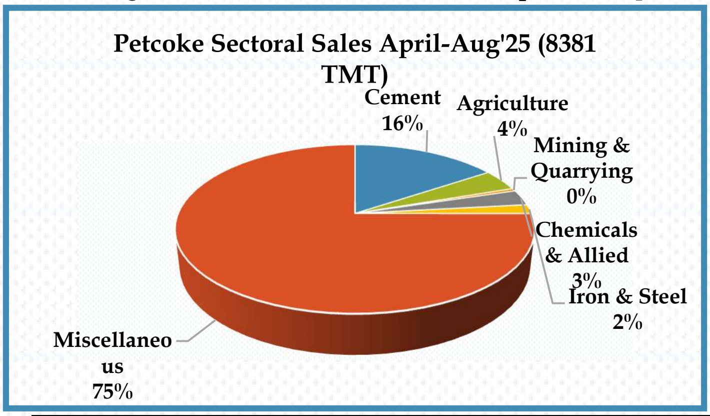
Petcoke gasifiers installed in the refinery consumes the petcoke produced in the processes.

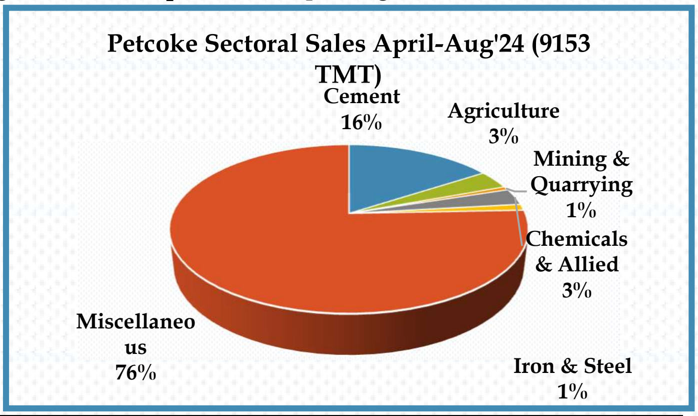
Sectoral consumption of Petcoke:

During 'April-Aug-25', total petcoke cummulative domestic consumption with a volume of 8.38 MMT registered 8.4% de-growth Year-on Year basis over the volume of 9.15 MMT in 'April-Aug-24'.
The cement sector continues to occupy the largest share in 'April-Aug-25' (P) at 16% followed by other Industries.

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

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





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

Light Diesel Oil

LDO consumption during the month Aug 2025 with a volume of 0.080 MMT registered a 0.7% growth over the volume of 0.080 MMT in Aug 2024.

Aug 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.

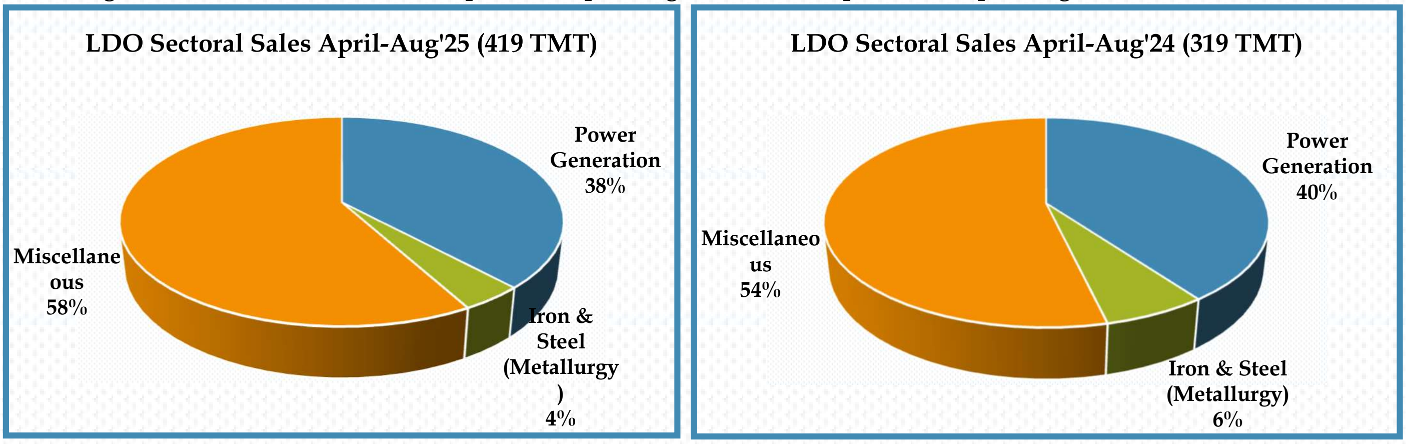
Sectoral consumption of Light Diesel Oil:

During 'April-Aug-25, total LDO domestic consumption with a volume of 0.42 MMT registered a 31.4% growth Year-on Year basis over the volume of 0.32 MMT in 'April-Aug-24.

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



April-Aug 25:-	April-Aug'24:-
Power Generation occupied a 38% share for the product followed by Iron & Steel & Misc industries	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.

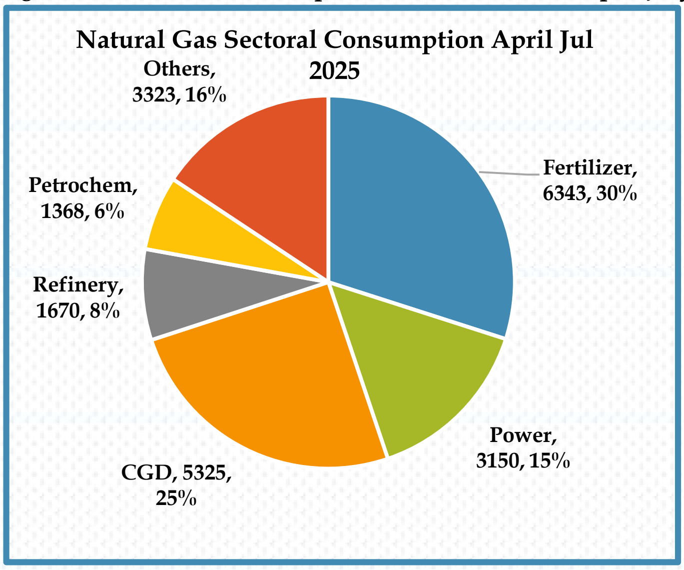
For the monthly consumption data, please refer NG report published by PPAC.

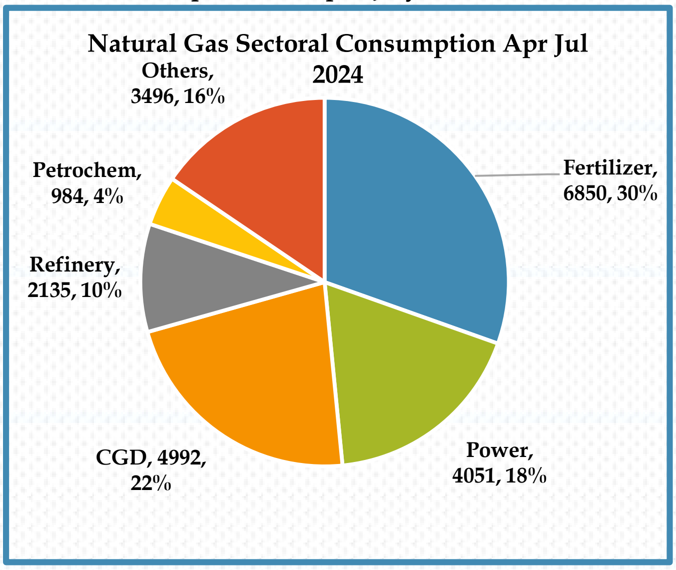
'Total Natural Gas Consumption (including internal consumption) for the month of August 2025 was 5822 MMSCM which was 3.8% lower than the corresponding month of the previous year. The cumulative consumption of 28705 MMSCM for the current financial year till August 2025 was lower by 7.9% compared with the corresponding period of the previous year.

Sectoral consumption of Natural Gas consumption of 'April-July'25'& its comparison to 'April-July'24: (PROVISIONAL)
During April-July25, total Natural Gas monthly domestic consumption with a volume of 21,178 MMSCM, over the volume of 22,508 MMSCM during the same period in the preceeding year

During April-July'25, consumption of Natural gas (NG) was driven by fertilizer (30%) followed by CGD (25%), Power (15%) Refinery (8%), Petrochemicals (6%). Misc sectors occupied a share of 16% in April-July2025.

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





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

P: provisional

April-July'2025	*April-July'2024*
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 30% 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 2024-25 (Provisional)												
												('000 MT)
Product	April-August 2025-26			August								
	FY2024-25	FY2024-26	Growth(%)_2025-26 over 2024-25	2021	2022	2023	2024	2025	Growth(%)_2024 over 2021	Growth(%)_2024 over 2022	Growth(%)_2024 over 2023	Growth(%)_2025 over 2024
(A) Sensitive Products												
LPG	12415	13349	7.5	2317	2388	2460	2664	2807	21.2	17.5	14.1	5.4
SKO	169	176	4.3	129	32	52	35	34	-73.4	8.6	-34.1	-0.9
Sub Total	12584	13525	7.5	2445	2420	2512	2698	2841	16.2	17.4	13.1	5.3
(B) Major Decontrolled Product												
HSD	38013	38899	2.3	5603	6343	6670	6501	6576	17.4	3.7	-1.4	1.2
MS	16701	17791	6.5	2692	3006	3093	3360	3544	31.7	17.9	14.6	5.5
Naphtha	5701	4971	-12.8	920	1089	1206	1156	1107	20.3	1.6	-8.3	-4.3
ATF	3651	3698	1.3	379	596	677	732	711	87.3	19.3	5.0	-2.9
Bitumen	3213	3300	2.7	312	316	501	286	421	35.0	33.1	-16.0	47.1
FO & LSHS	2734	2471	-9.6	517	617	509	498	519	0.4	-15.8	1.9	4.2
Lubricants & Greases	1941	1881	-3.1	364	243	326	341	365	0.1	50.3	11.9	6.9
LDO	319	419	31.4	82	66	75	80	80	-2.3	21.2	6.5	0.7
Sub Total	72274	73429	1.6	10870	12275	13058	12954	13323	22.6	8.5	2.0	2.9
Sub - Total (A) + (B)	84858	86954	2.5	13315	14695	15570	15652	16164	21.4	10.0	3.8	3.3
(C) Other Minor Decontrolled Products												
Petroleum coke	9153	8381	-8.4	928	1230	1759	1725	1726	86.0	40.2	-1.9	0.0
Others	5673	4326	-23.7	968	1516	1516	884	839	-13.3	-44.7	-44.7	-5.0
Sub Total	14826	12706	-14.3	1896	2747	3275	2609	2565	35.3	-6.6	-21.7	-1.7
Total	99684	99660	0.0	15211	17442	18845	18261	18729	23.1	7.4	-0.6	2.6

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

Table-11

Industry Consumption Trend Analysis 2024-25 (Provisional)												
('Million Barrels per Day)												
Product	April-August 2025-26			August								
	FY2024-25	FY2024-26	Growth(%)_ 2025-26 over 2024-25	2021	2022	2023	2024	2025	Growth(%)_2024 over 2021	Growth(%)_2024 over 2022	Growth(%)_2024 over 2023	Growth(%)_2025 over 2024
(A) Sensitive Products												
LPG	0.94	1.01	7.5%	0.87	0.89	0.92	1.00	1.05	21.2%	17.5%	14.1%	5.4%
SKO	0.01	0.0093	4.3%	0.03	0.01	0.01	0.01	0.01	-73.4%	8.6%	-34.1%	-0.9%
Sub Total	**1.0**	**1.0**	**7.5%**	**0.9**	**0.9**	**0.9**	**1.0**	**1.1**	**17.6%**	**17.4%**	**13.4%**	**5.3%**
(B) Major Decontrolled Product												
HSD	1.89	1.93	2.3%	1.38	1.56	1.64	1.60	1.61	17.4%	3.7%	-1.4%	1.2%
MS	0.97	1.03	6.5%	0.77	0.86	0.89	0.96	1.02	31.7%	17.9%	14.6%	5.5%
Naphtha	0.32	0.28	-12.8%	0.26	0.31	0.34	0.32	0.31	20.3%	1.6%	-8.3%	-4.3%
ATF	0.19	0.20	1.3%	0.10	0.16	0.18	0.19	0.19	87.3%	19.3%	5.0%	-2.9%
Bitumen	0.13	0.13	2.7%	0.06	0.06	0.10	0.06	0.08	35.0%	33.1%	-16.0%	47.1%
FO & LSHS	0.12	0.11	-9.6%	0.11	0.13	0.11	0.11	0.11	0.4%	-15.8%	1.9%	4.2%
Lubricants & Greases	0.09	0.09	-3.1%	0.09	0.06	0.08	0.08	0.09	0.1%	50.3%	11.9%	6.9%
LDO	0.02	0.02	31.4%	0.02	0.02	0.02	0.02	0.02	-2.3%	21.2%	6.5%	0.7%
Sub Total	**3.7**	**3.8**	**1.7%**	**2.8**	**3.1**	**3.3**	**3.3**	**3.4**	**23.1%**	**8.8%**	**2.5%**	**2.7%**
Sub - Total (A) + (B)	**4.7**	**4.8**	**2.8%**	**3.7**	**4.0**	**4.3**	**4.3**	**4.5**	**21.8%**	**10.7%**	**4.9%**	**3.3%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.33	0.30	-8.4%	0.17	0.22	0.31	0.31	0.31	86.0%	40.2%	-1.9%	0.0%
Others	0.30	0.23	-23.7%	0.25	0.39	0.39	0.23	0.22	-13.3%	-44.7%	-44.7%	-5.0%
Sub Total	**0.6**	**0.5**	**-15.7%**	**0.4**	**0.6**	**0.7**	**0.5**	**0.5**	**26.0%**	**-14.3%**	**-25.7%**	**-2.1%**
Total	**5.3**	**5.35**	**0.6%**	**4.1**	**4.7**	**5.0**	**4.9**	**5.0**	**22.2%**	**7.4%**	**0.5%**	**2.7%**

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

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