INDUSTRY CONSUMPTION REPORT

POL & NG June 25

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CIRCULATION:

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

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

Subject: Industry Consumption Review Report of PPAC: June 2025

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of June 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, Sh Subrat Kar and Sh. Surendra Julka-IOCL, Sh. Sanjay Kumar and Sh. Debesh Purohit- HPCL, Sh Anurag Mittal & Sh Sanjeev Gupta – 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
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Additional Director (Demand & Economic Studies)-I/c

Highlights of the month: June 2025

- In June, the Reserve Bank of India lowered the repo rate by 50 basis points to 5.5% to promote growth in the face of global uncertainty.

- HPCL to invest $231 million to build 24 compressed biogas plants in India.

- Adani commissions India's 1st off-grid green hydrogen pilot plant in Kutch , Gujarat.

- TruAlt Bioenergy Receives OMC Status and will offer ethanol, Bio-CNG, petrol, diesel, EV charging, and battery swapping facilities in their Retail Outlets beginning in Karnataka and Maharashtra .

- DPIIT Notification in the amendment of the static and mobile pressure vessels rules 2016 allowing spark ignition vehicles to be used in the hazardous area which will allow the LNG/ CNG vehicles in the transportation of POL products .

- Retail inflation falls to 6-year low of 2.10% in June 2025.

- The gross GST revenue collected in Jun 2025 reached 1.85 lakh crore, marking a 6.2% year-on-year growth compared to Jun 2024.

- India's manufacturing sector PMI rose to 58.4 in June'25 — the highest in 14 months — up from 57.6 in May and 58.2 in April. Growth in new orders and output both quickened to near one-year highs, and remained well above long-term averages, signaling sustained sectoral strength.

- India successfully met peak power demand of 243 GW in June 25 with zero peak shortage. India's power consumption in June 2025 was 150.04 billion units (BU), a slight decrease from 152.37 BU in June 2024.

- India's largest automobile in-plant railway siding at Maruti Suzuki's Manesar facility Inaugurated on 17th June 25. It will contribute to savings of 60 million liter of fuel annually at full capacity.

- PM has inaugurated one of the nation's most ambitious railway projects in June 25 , which had connected the Kashmir Valley with the rest of India.

SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in June 2025 with a volume of 20.31 MMT registered a growth of 1.9% against the historical of 19.94 MMT in June 2024.

2. MS (Petrol) consumption during the month of June 2025 with a volume of 3.52 MMT (1.04 mbpd) recorded a growth of 6.8% on the volume of 3.30 MMT (0.98 mbpd) in June 2024.

3. 'Ethanol 'Ethanol blending in Petrol was 19.9% during Jun'25 and cumulative ethanol blending during November 2024- Jun'2025 was 18.9%.

4. The Domestic Sale of Passenger Vehicles in Jun 2025 with a volume of 2.98 lacs registered 2.5% growth over Jun 2024, as per FADA with SUV the driver for the growth.

5. HSD (Diesel) consumption during the month of June 2025 with a volume of 8.11 MMT (2.06 mbpd) registered growth of 1.6% over the volume of 7.98 MMT (2.02 mbpd) in the month of June 2024.

6. LPG consumption during the month of June 2025 with a volume of 2.53 MMT registering a growth of 9.0% over the volume of 2.30 MMT in June 2024. LPG has been growing since last year riding on growth in PMUY segment.

7. ATF consumption during June 2025 with a volume of 0.73 MMT continued to register a growth of 3.3%, over a volume of 0.71 MMT during the month of June 2024.

8. Bitumen consumption during June 2025 with a volume of 0.68 MMT registered a de-growth of 8.1% over the volume of 0.74 MMT in the month of June 2024.

9. Kerosene (SKO) consumption with a volume of 0.04 MMT registered a growth of 12.5% in June 2025 as compared to June 2024. SKO consumption during the month is largely constituted by PDS category with a 59% share.

10. 'Total Natural Gas Consumption (including internal consumption) for the month of June 2025 was 5860 MMSCM which was 10% higher than the corresponding month of the previous year. The cumulative consumption of 17448 MMSCM for the current financial year till June 2025 was higher by 0.8 % compared with the corresponding period of the previous year.

11. As on 30th Jun'2025, number of active LPG domestic connections are 33.05 cr and PMUY connections 10.33 cr.

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

Product	June				April-June			
	2024	2025	% share of June'25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-June'25
(A) Sensitive Products								
LPG	2320	2528	12.4	9.0	7102	7734	8.9	12.5
SKO	36	41	0.2	12.5	93	105	13.1	0.2
Sub Total	**2356**	**2569**	**12.6**	**9.0**	**7196**	**7839**	**8.9**	**12.7**
(B) Major Decontrolled Product								
HSD	7982	8107	39.9	1.6	24319	24961	2.6	40.4
MS	3296	3522	17.3	6.8	10044	10753	7.1	17.4
Naphtha	1014	1028	5.1	1.4	3321	2956	-11.0	4.8
ATF	707	730	3.6	3.3	2193	2278	3.9	3.7
Bitumen	744	683	3.4	-8.1	2519	2351	-6.7	3.8
FO/LSHS	575	509	2.5	-11.5	1727	1514	-12.3	2.4
Lubes+Greases	436	388	1.9	-11.0	1282	1154	-10.0	1.9
LDO	65	86	0.4	32.8	178	253	41.8	0.4
Sub Total	**14819**	**15054**	**74.1**	**1.6**	**45583**	**46220**	**1.4**	**74.7**
(C) Other Minor Decontrolled Products								
Pet.Coke	1532	1821	9.0	18.9	5060	5193	2.6	8.4
Others*	1230	869	4.3	-29.4	3342	2584	-22.7	4.2
Sub Total	**2762**	**2690**	**13.2**	**-2.6**	**8403**	**7777**	**-7.4**	**12.6**
Total	**19937**	**20313**	**100**	**1.9**	**61181**	**61837**	**1.1**	**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 May'25-June'25, which may undergo change on receipt of actual data), and

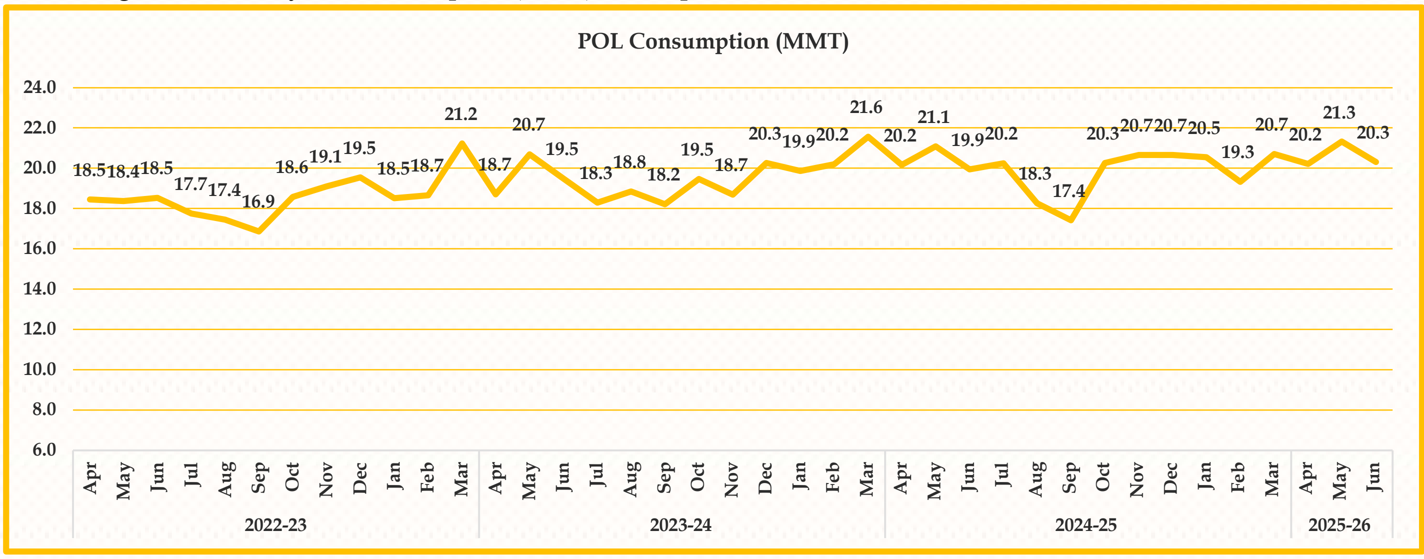
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

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.

Overall consumption of all petroleum products in June 2025 with a volume of 20.31 MMT growth by 1.9% over the volume of 19.94 MMT in June 2024. Growth in the POL was driven by growth in MS at 6.8%, ATF at 3.3%, LPG at 9.0% and HSD at 1.6%.

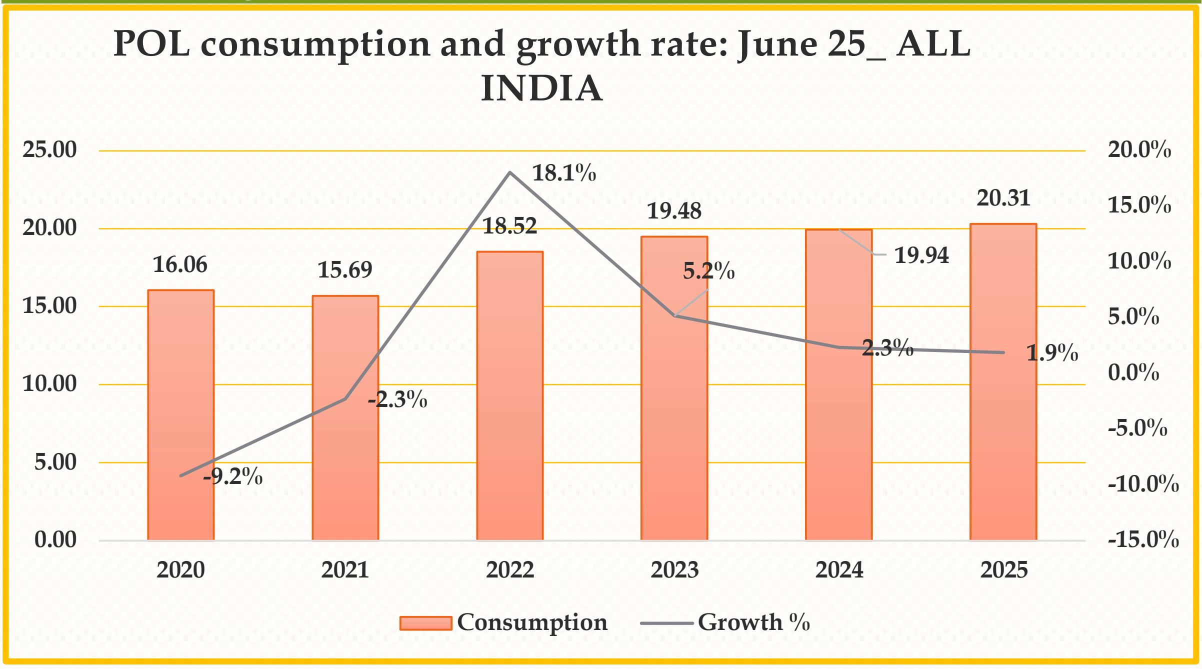
Pan India based domestic POL monthly consumption trend since April-2022 is shown in Figure-A.

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



- ✓ The overall POL domestic consumption profile of the June 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 TMT*

Petrol/Motor Spirit (MS):

MS (Petrol) consumption during the month of June 2025 with a volume of 3.52 MMT recorded a growth of 6.8% on the volume of 3.30 MMT in June 2024.

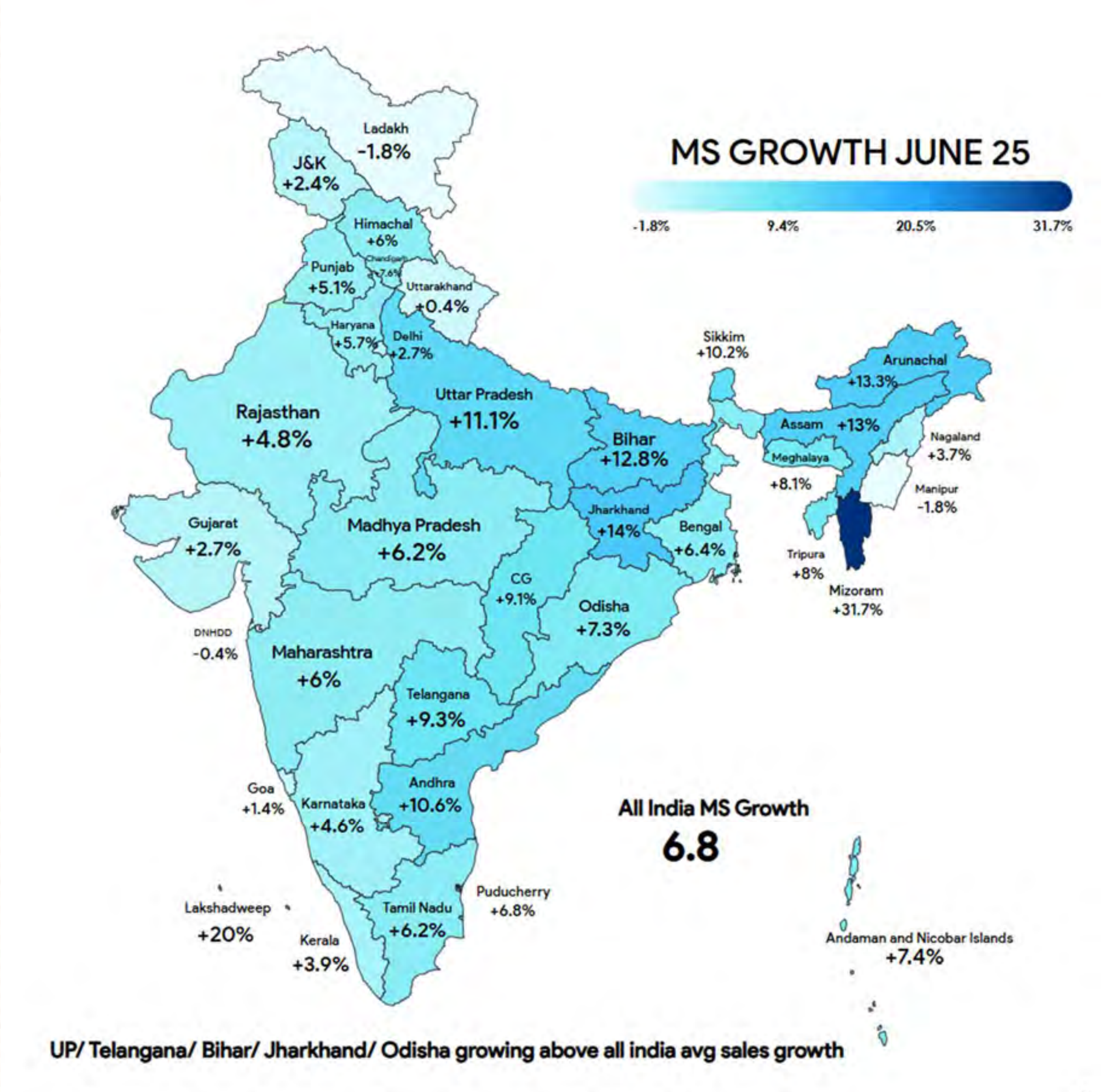
PSU's registered a growth rate of 5.7% as against 18.8% achieved by their private sector counterparts in June-25. Market share held by PSU reduced by 0.98% (90.29% share) with corresponding increase in market share held by Private sector OMC's.

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

- The growth in MS sales was primarily driven by the summer travel season which is reflecting in the above all India average growth of MS in northeast states . 11 % Growth in the big states like Uttar Pradesh is contributing heavily in the MS continuous upward trajectory .

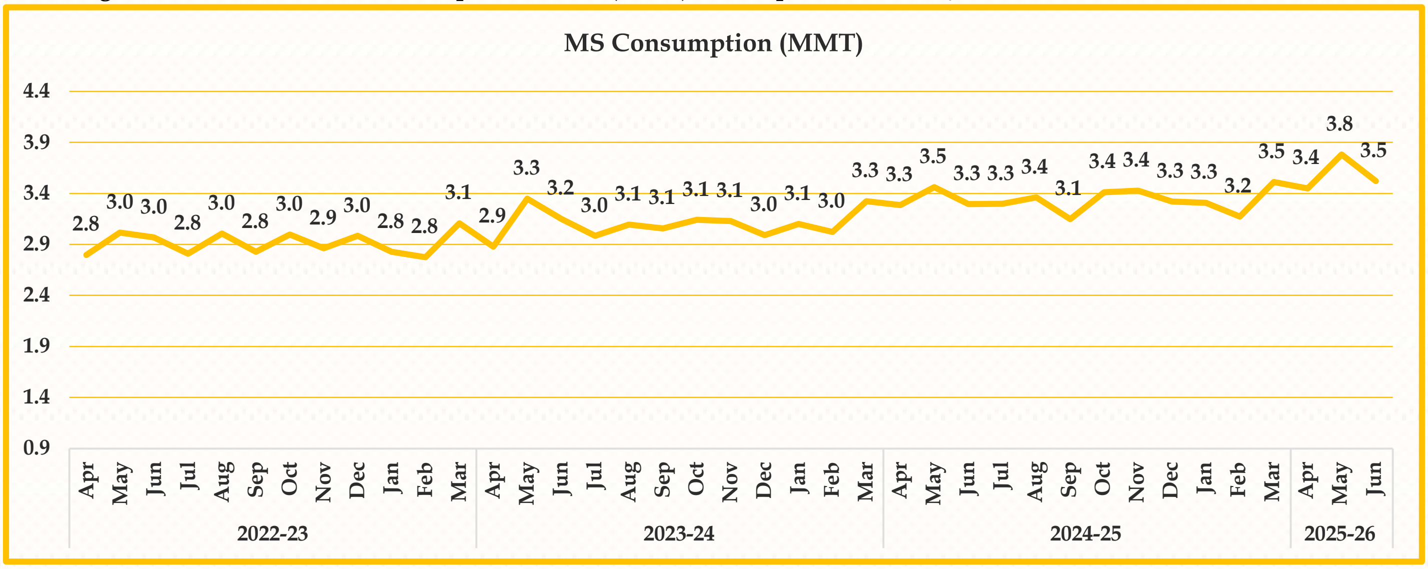
- Higher vehicle sales and increased mobility with continued growth in Petrol SUV segment contributed to higher growth of MS .

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



Factors impacting consumption of MS:
Passenger Vehicle Sales:

The Sale of Passenger Vehicles in June 2025 at 2.98 lacs registered 2.5% growth YoY basis over sale of 2.91 lacs in the month of June 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 June 2025 (Primary sales data)**

Vehicle Segment	June 25		
	2024	2025	Growth %age
Total PV	290,593	297,722	2.5%

Source: FADA

Two-Wheeler Sales:

Two-wheeler sales in Jun 2025 with a volume of 14.46 lacs registered 4.7 Growth, YoY basis over volume of 13.81 lacs during Jun 2024, as shown in the following table-3.

Three-Wheeler sales

Three-wheeler domestic sales in Jun 2025 with a volume of 1.01 lac recorded a growth of 6.7%, YoY basis over the volume of 0.94 lac in June 2024, as shown in the following table-3

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

Vehicle Segment	June'25		
	2024	2025	Growth %age
Total Two Wheelers	1,381,040	1,446,387	**4.7%**
Passenger Carrier-3 wheeler	42,686	48,848	**14.4%**
Goods Carrier-3 wheeler	8,970	9,468	**5.6%**
E-Rickshaw	37,965	35,367	**-6.8%**
E-cart	4,610	6,846	**48.5%**
Total Three Wheelers	94,231	100,529	**6.7%**

Source: FADA

High Speed Diesel (HSD):

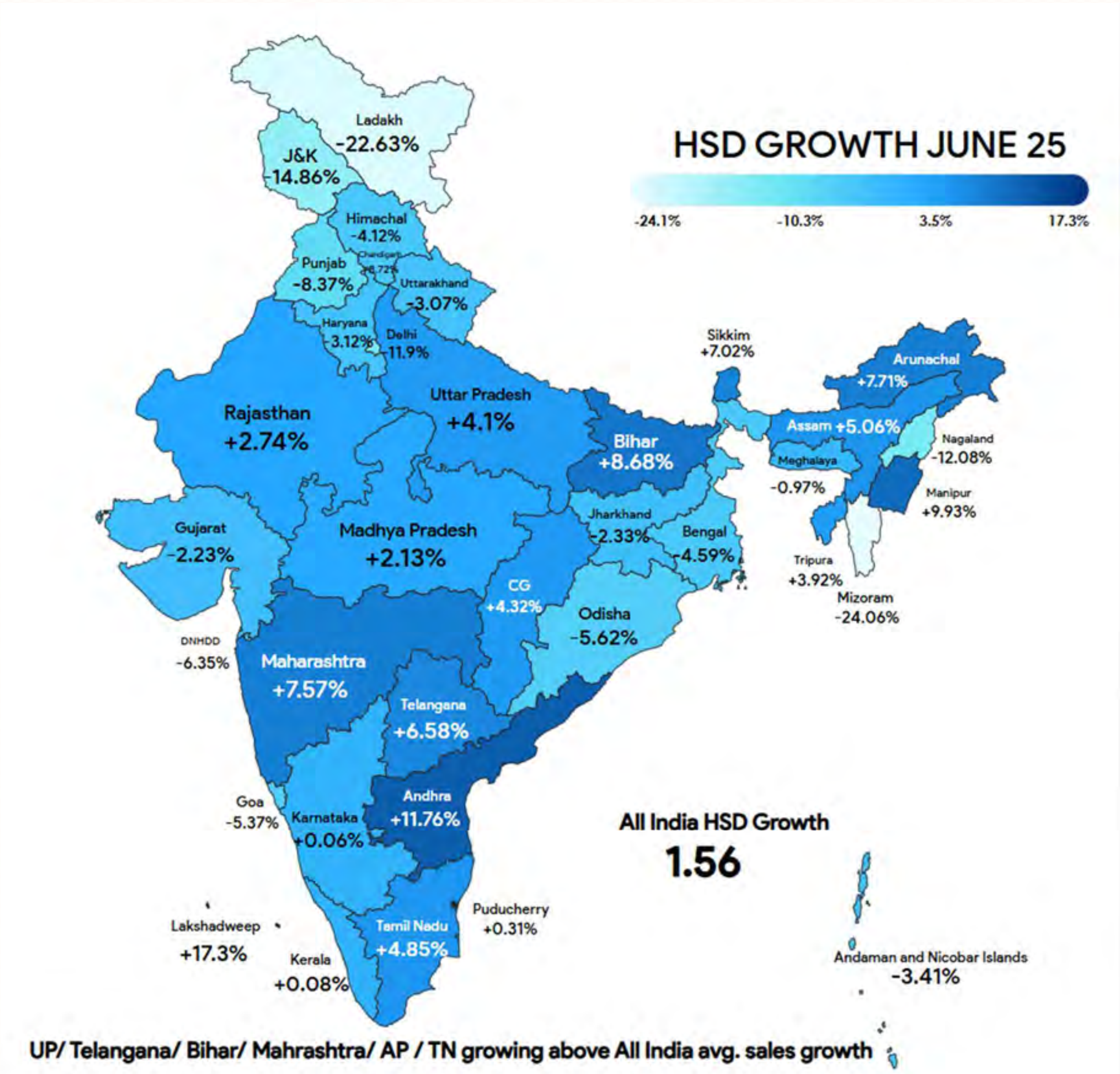
HSD (Diesel) consumption during the month of June 2025 with a volume of 8.11 MMT, registered a growth of 1.6% on the volume of 7.98 MMT in the month of June 2024.

- PSU's registered a 0.2% de-growth their private sector counterparts in the month of June-25.
- Market share held by PSU reduced by 1.52% (87.07% 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 is growing at 9.88 % in June 25 . Major sectors like Mining and miscellaneous segment showing healthy growth .
- High growth in major volume states like Maharastra , UP and AP on account of agricultural activity contributed heavily in the growth of HSD retail growth . VAT increase in karnataka is also helping in increasing HSD sales in Maharastra .
- Increased GSTN & e-way bills point towards increased freight activity coupled with higher rural consumption.

Figure-E: State Wise Growth in HSD month of Jun-2025



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

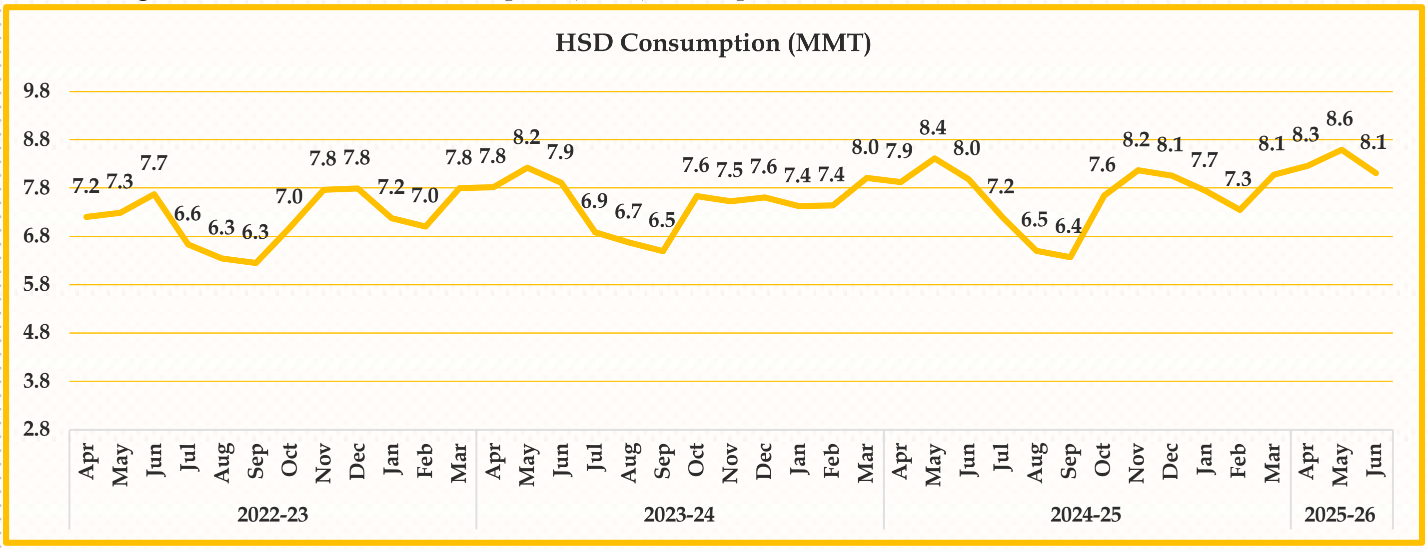
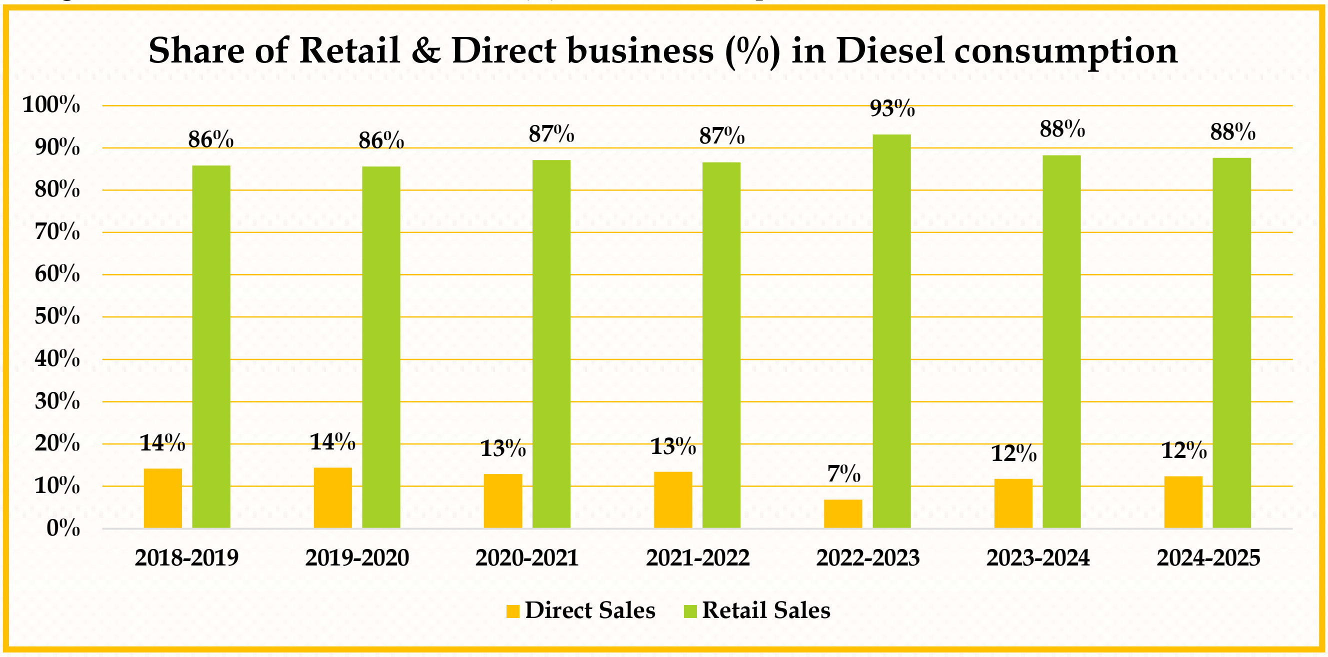


Figure-G: Share of Retail & Direct business (%) in Diesel consumption



Factors impacting consumption of HSD:

Weather

June 2025 saw the full arrival of the southwest monsoon, bringing widespread rainfall and cooler temperatures. Most regions experienced below-average daytime highs, with heavy rains and thunderstorms dominating much of the month. Kerala and parts of southern India marked the official onset of the monsoon on June 1, with rainfall exceeding long-term averages.

Northern and central India enjoyed cooler conditions, while humidity remained high. Western and northern states like Rajasthan had brief heatwaves, but overall, June was less intense than usual. The monsoon rains helped lower temperatures but led to persistent humidity, making conditions feel sultry in urban areas.

The early rains benefited kharif sowing, with improved soil moisture for crops. However, excess rainfall in certain regions caused flooding, especially in Bihar and Uttar Pradesh, leading to delays in harvesting and waterlogging in agricultural areas.

Urban flooding became a challenge in cities like Mumbai and Chennai, while landslides affected hilly regions. Despite this, the monsoon eased water stress in many areas, though infrastructure was strained.

June 2025 was a wet and cooler-than-usual month, with the monsoon bringing relief from heat but causing local flooding and agricultural delays. Overall, the rains were beneficial for agriculture and water supply, but flooding and humidity presented challenges.

Figure- H: Sub-Division Rainfall Map for June 25 vs June 24. (Sourcew : 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	June-25	June -24	Variance	Apr- June 25	Apr- June 24	Growth
Intra State	788.57	651.70	21%	2,360.46	1,952.38	20.9%
Inter State	406.02	349.39	16%	1,253.31	1,046.87	19.7%
Total	**1,194.59**	**1,001.09**	**19%**	**3,613.77**	**2,999.26**	**20.5%**

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 6.6% as compared to June 2024 as shown in Table-5

Tractor Sale:

Tractor domestic sales in June 2025 with a volume of 71,047 registered a growth of 8.0% over the volume of 77,214 in June 2024.

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

Commercial vehicles & tractors		June'25		
		2024	2025	Growth %age
CV	LCV	40,872	44,469	8.8%
	MCV	6,417	7,393	15.2%
	HCV	21,473	21,447	-0.1%
	Others	63	58	-7.9%
Total CVs		**68,825**	**73,367**	**6.6%**
Tractors		77,214	71,047	-8.0%

Source: FADA research

Port Traffic:

The Major Ports achieved cargo throughput of 220.17 MMT during April-June'2025 which is 5.62% higher over same Period last year.

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

Ports	Apr-June'25	Apr- June'24	Growth (%)
Kolkata & Haldia	17186	14179	21.21
Paradip	39245	37539	4.54
Visakhapatnam	21587	21923	-1.53
Kamarajar (Ennore)	11788	11715	0.62
Chennai	15060	12937	16.41
V.O. Chidambaranar	10729	10366	3.50
Cochin	9408	9321	0.93
New Mangalore	10744	10789	-0.42
Mormugao	4842	4626	4.67
Mumbai	17466	17061	2.37
JNPA	24199	21999	10.00
Deendayal	37913	35994	5.33
Total:	**220167**	**208449**	**5.62**

POWER SITUATION:

India's peak demand for power degrew to 243.12 gigawatt (GW) in Apr-Jun'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 242.49 GW registered in Apr-Jun'25 when the temperature across the country rose drastically, data sourced from the Central Electricity Authority showed. Rainfall contributed to lower electricity demand in the month.

Peak demand met during Apr-Jun'25 stood at 243.12 GW, which is almost same as the Peak Demand.

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

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficts(-)		Peak Demand	Peak Met	Surplus(+) / Defficts(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	341,418	340,372	-1,046	-0.3%	193,996	191,243	-2,753	-1.4%
2022-23	404,605	400,448	-4,157	-1.0%	215,888	207,231	-8,657	-4.0%
2023-24	407,780	406,862	-918	-0.2%	224,106	223,292	-814	-0.4%
2024-25	452,399	451,811	-588	-0.1%	249,856	249,854	-2	0.0%
2025-26	445,800	445,636	-164	0.0%	243,118	242,493	-625	-0.3%

SECTORAL CONSUMPTION OF HSD:

During 'April-June-25, HSD total consumption with a volume of 24.96 MMT registered 2.6%growth Year-on Year basis over the volume of 24.32 MMT in 'April-June-24.

88% of HSD consumption during 'April-June-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-June-24' also after direct sales volume recovering back.

Growth of 2.6% during Apr-June'25 was driven by increased economic activity & freight movement, evident by a 19 % jump in Total E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for April-June-25' 'Road Transport' was 19%, the highest share followed by Mining 13%, Manufacturing at 12%, Shipping 7%, Agriculture 2% 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 21% to 19%.

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

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

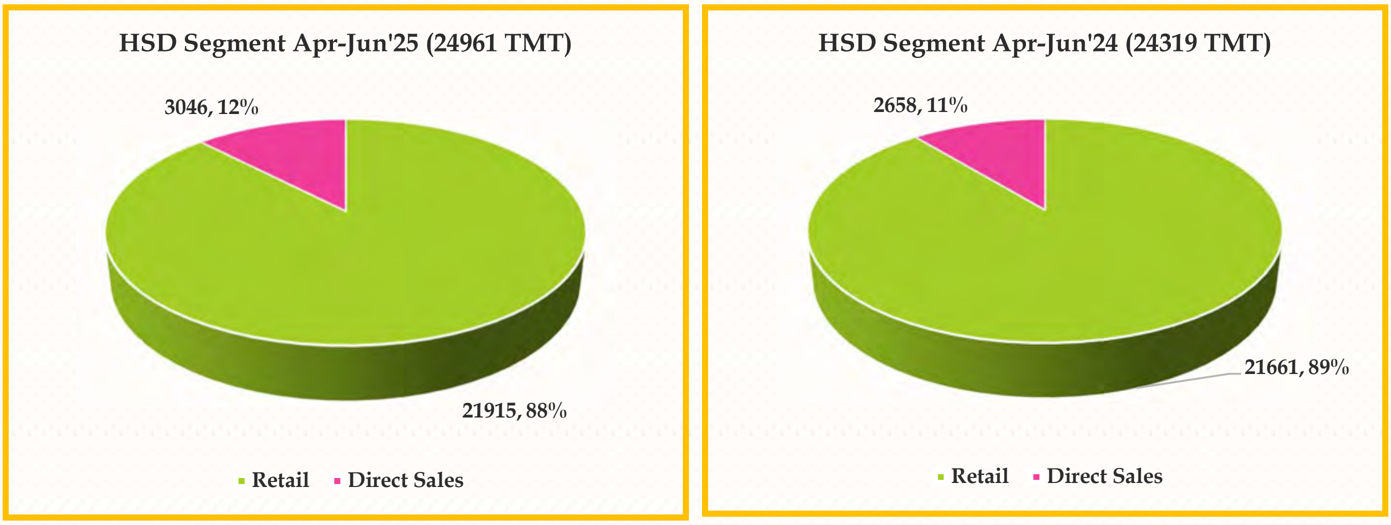
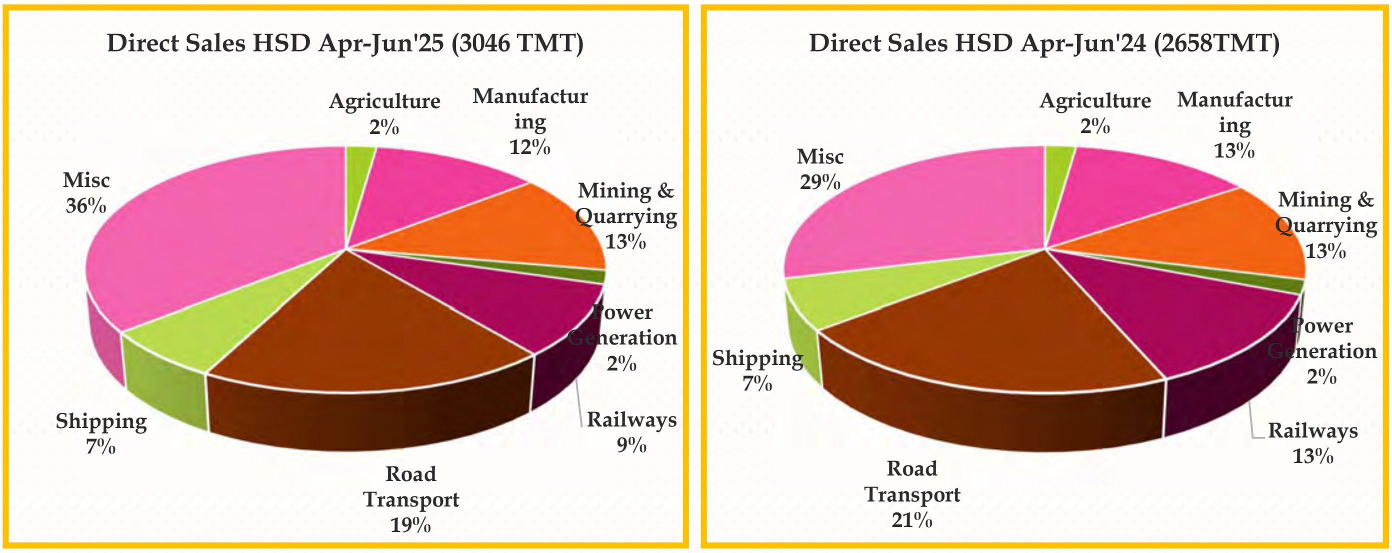


Figure-I(II): Sectoral HSD consumption Breakup in April-June'25 *and* its comparison with April-june'24



Share of Manufacturing has increased from 13% 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 0.04 MMT registered a growth of 12.5% in June 2025 as compared to June 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 59% & 41% respectively for the month Jun 2025 as shown in the following figure-J.

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

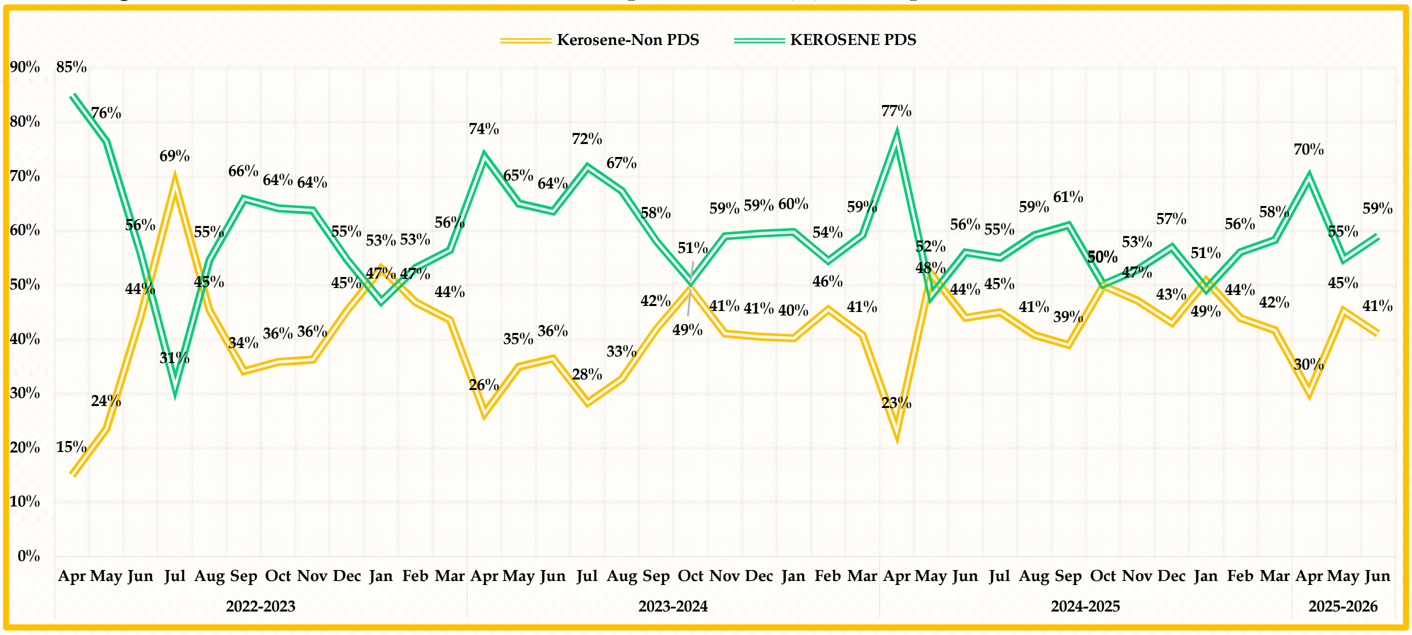
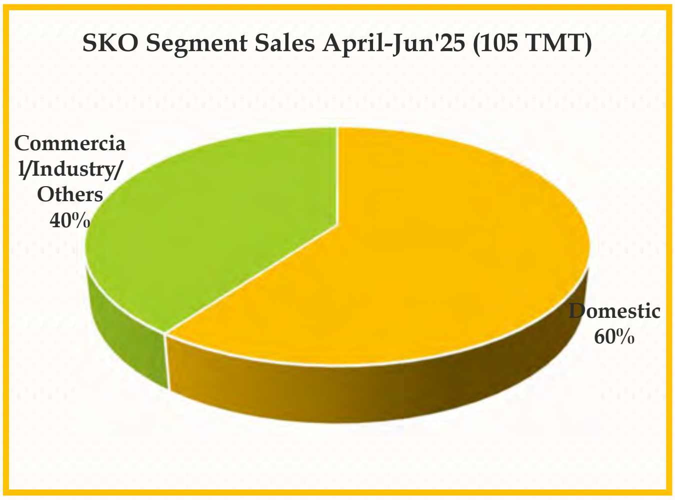
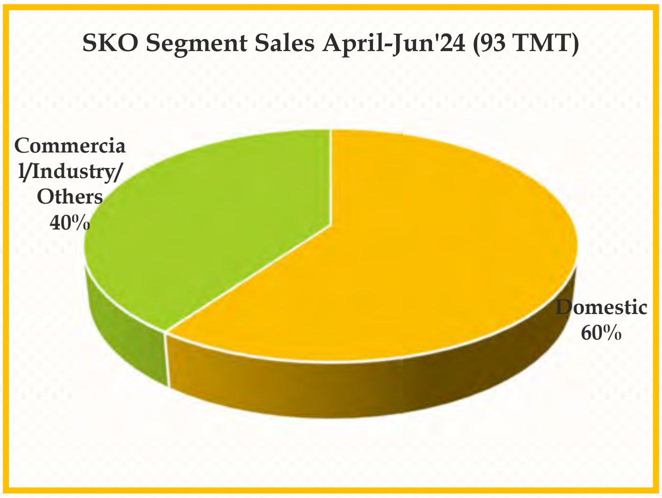


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene





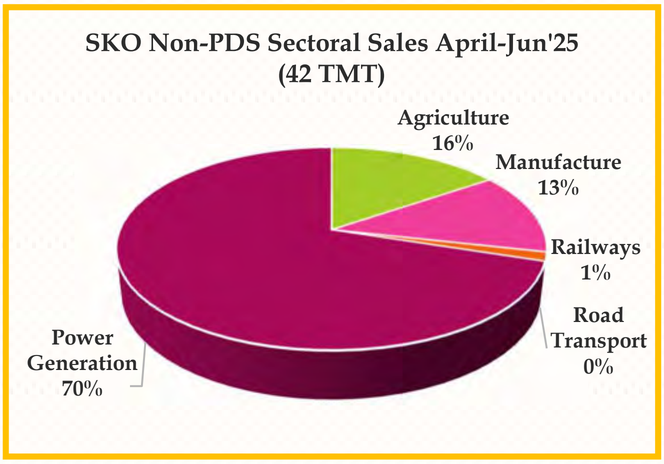
Sectoral consumption of SKO:

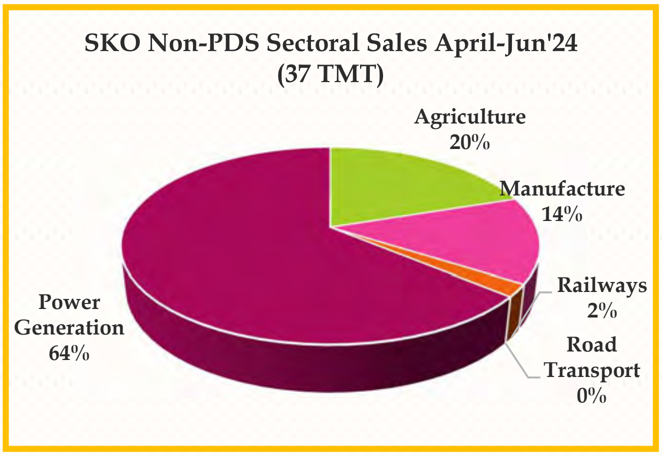
Out of total SKO sales during 'April-June'25 'PDS subsidized SKO' upliftment constituted to 59%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 16% share, Manufacturing 13%, and Miscellaneous applications at 70%.

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



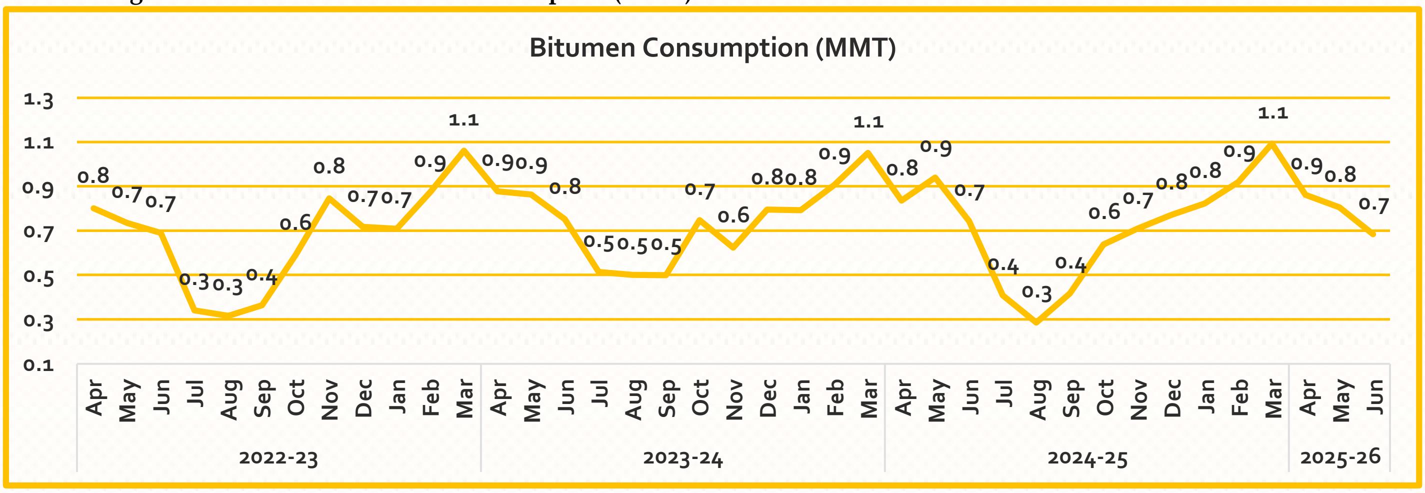


BITUMEN:

Bitumen consumption during Jun 2025 with a volume of 0.68 MMT registered de-growth of 8.1% over the volume of 0.74 MMT in the month of Jun 2024. De growth is primarily on account of low road constructions activities in major states like Maharastra, Rajasthan and Uttar Pradesh. Rains dampened the bitumen demand. Slight growth observed in imports of Bitumen in June 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-Jun-25, total bitumen consumption with a volume of 2.35 MMT registered a de-growth of 6.7% Year-on Year basis over the volume of 2.52 MMT in 'April-Jun-24.

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

.

LPG:

LPG consumption during the month of Jun 2025 with a volume of 2.53 MMT registered growth in the month at 9.0% over the volume of 2.32 MMT in the month of Jun 2024. LPG consumption during the month continues to be largely driven by higher consumption in PMUY domestic packed with a share of 88.2%.

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.

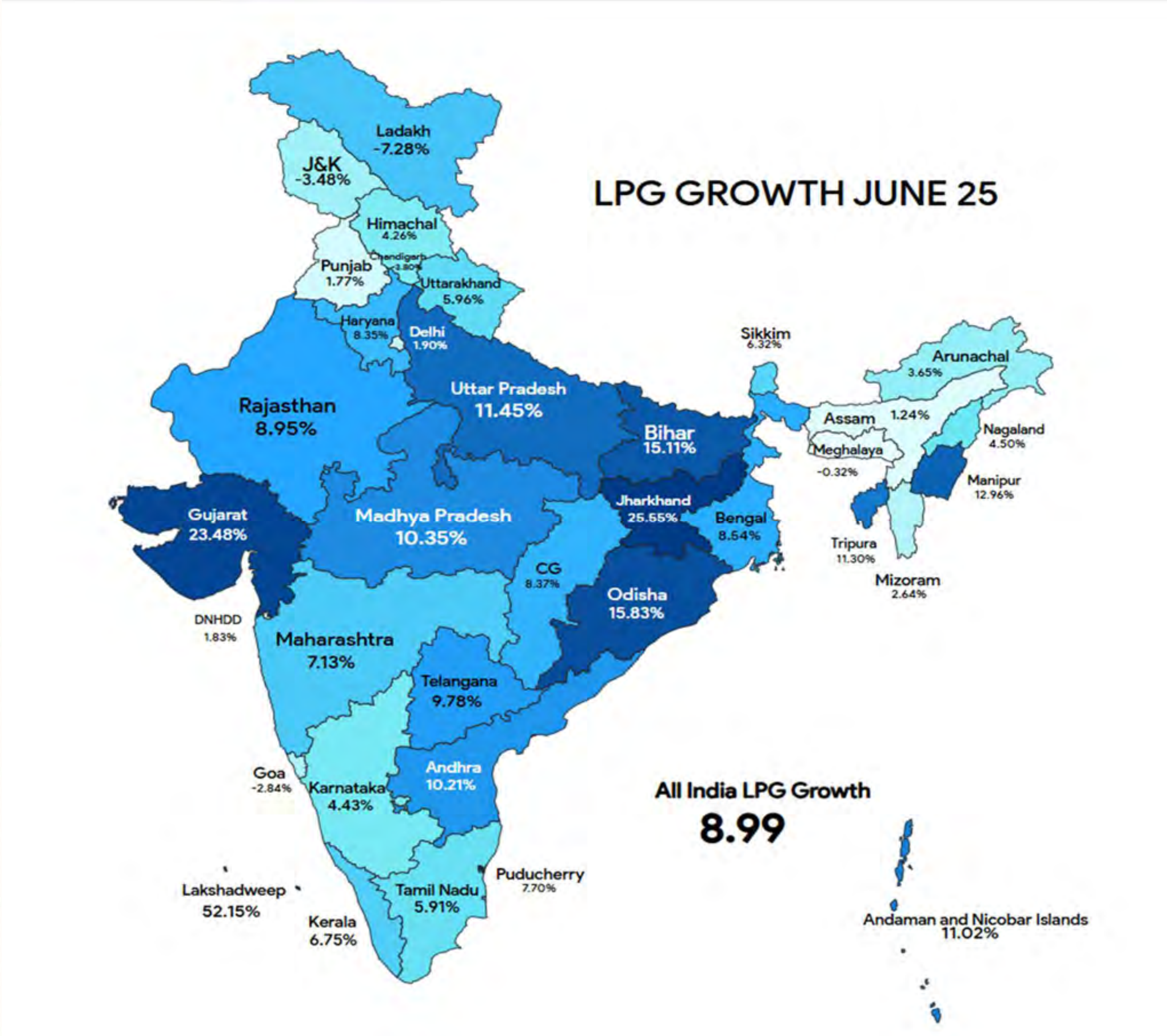
The PMUY sales coupled with subsidized prices contributed to growth rate in LPG consumption. Growth in Bulk LPG contributed to total LPG growth.

1. 8.6% growth in Packed domestic LPG consumption in Jun'25 as compared to Jun'24.
2. 6.5% growth in Non-Domestic packed after a long period.
3. Under PMUY scheme 10.33 crores beneficiaries at the end of Jun 2025.
4. As on 1.07.2025, total active domestic connections in India are 3305.2 lakhs

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

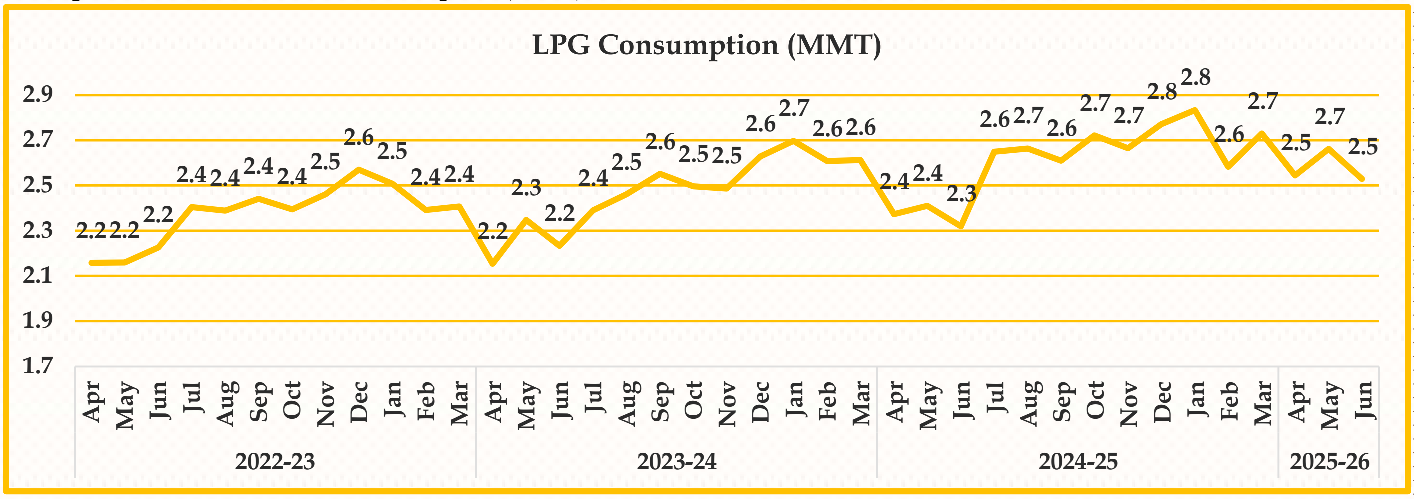
   - PMUY growth 15.4% wherein OMCs-wise %growth as contributed by 14.7% (IOC), 11.0% (BPC) & 21.2% (HPC)..
   - New connections ~90.8% issued with DBCs in Jun'25 (including SBC to DBC conversion).
5. 15.7 Crs cylinders of 14.2kg (~50.7 lacs/day) were delivered in Jun`25 compared to 14.5 Crs in Jun`24..
6. Growth of 53.6% in Bulk LPG consumption due to following reasons:
   - Low base in the month of May-24 and Jun-24.
   - With higher NG prices in CY, customers have shifted to LPG for cost savings. And price variation of Bulk LPG in Jun'25 Rs. 75.4/kg as compared to Jun'24 rate was Rs. 71.8/kg.

Figure-N: State Wise Growth in LPG month of Jun-2025



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

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

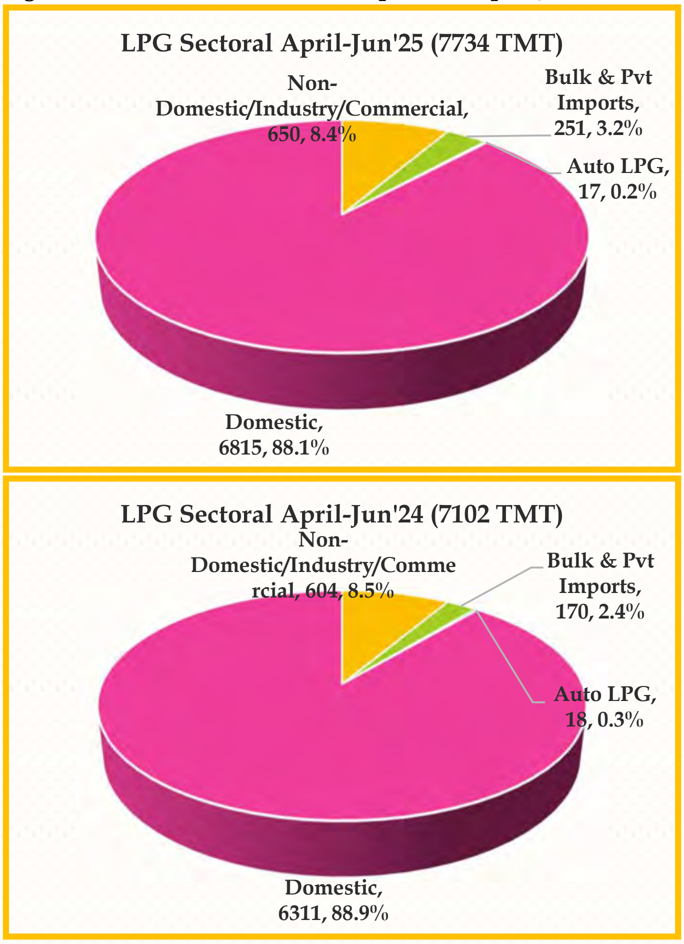


Sectoral consumption of LPG:

During 'April-Jun-25, total LPG domestic consumption with a volume of 7.73 MMT registered 8.9% growth Year-on Year basis over the volume of 7.10 MMT in 'April-Jun-24.

The Sectoral LPG consumption during 'April-Jun-25', was driven by Domestic packed at 88.1%, followed by LPG 'non-domestic/ industry/ commercial sector 8.4% & Bulk at 3.2%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

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



Naphtha:

Naphtha consumption during Jun 2025 with a volume of 1.03 MMT registered a growth of 1.4%, over a volume of 1.01 MMT during the month of Jun 2024.

Sectoral consumption of Naphtha:

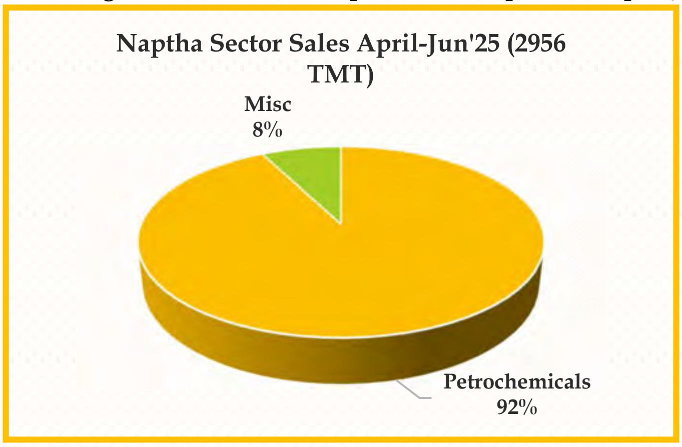
During 'April-Jun-25, total Naphtha domestic consumption with a volume of 2.96 MMT registered de-growth of 11.0% Year-on Year basis over the volume of 3.32 MMT in 'April-Jun-24.

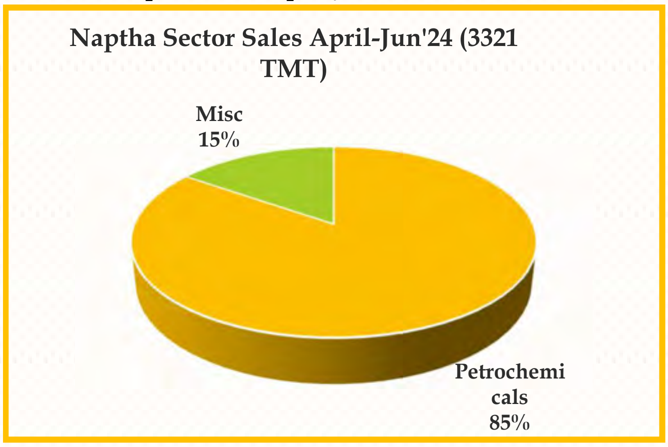
Petrochemical industries remain the main consumers of naphtha. Naphtha consumption showed a de-growth during the month with reduced consumption in Petchem plants, due to the geopolitical situation between US & China and also lower Gas prices.

92 % 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-Jun-25 and its comparison to 'April-Jun-24



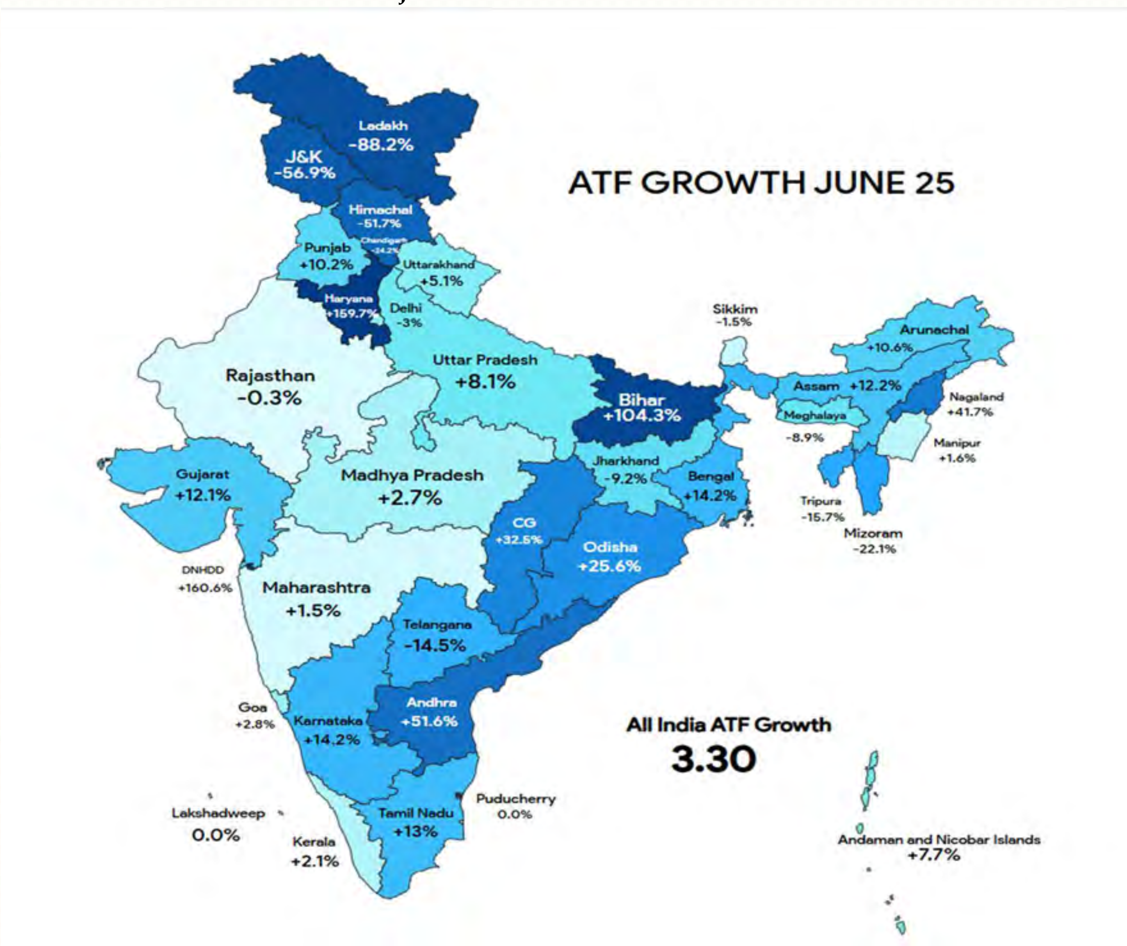


ATF:

ATF consumption during Jun 2025 with a volume of 0.73 MMT continued to registered a growth of 3.3%, over a volume of 0.71 MMT during the month of Jun 2024.

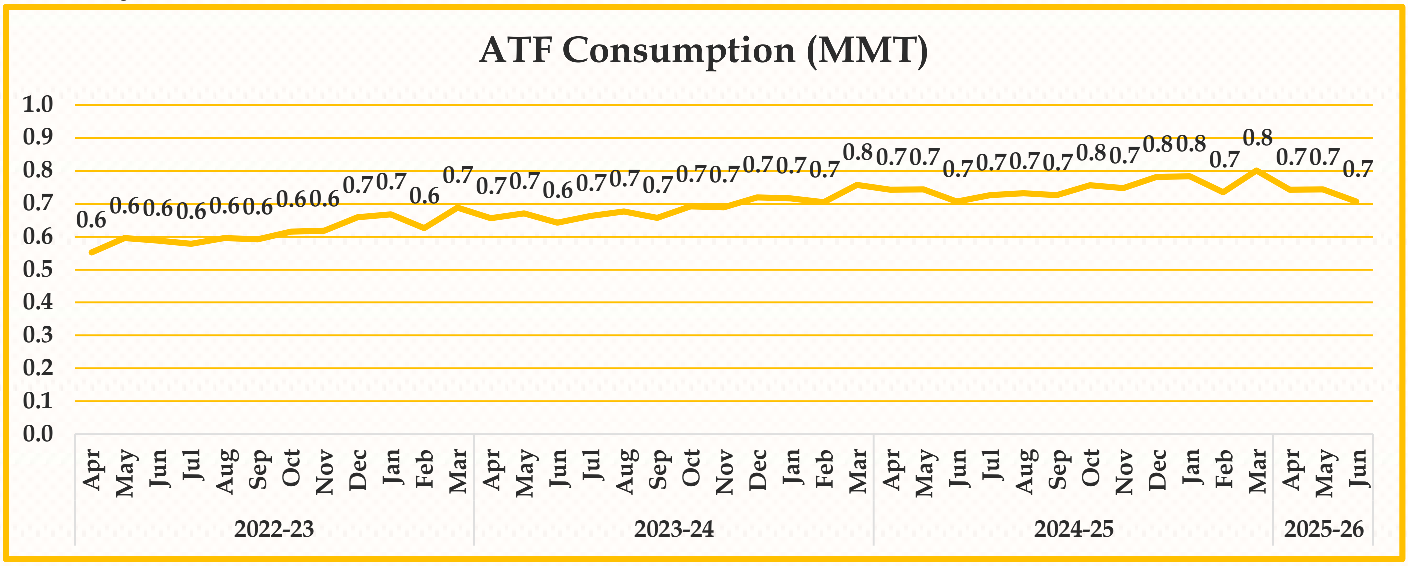
ATF sales growth remained subdued in Jun'25 at 3.3%, primarily due to Delhi Airport's runway work and sending aircraft for checks ahead of the October–December peak season resulted in Domestic flights in India dropped below 3,000 daily .

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



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

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



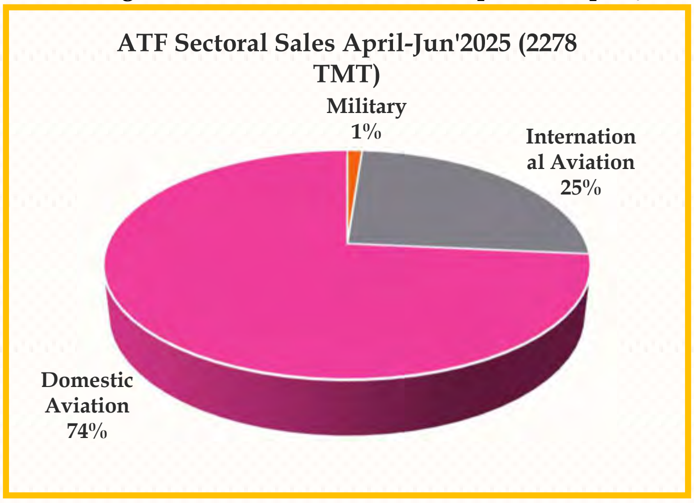
Sectoral consumption of ATF:

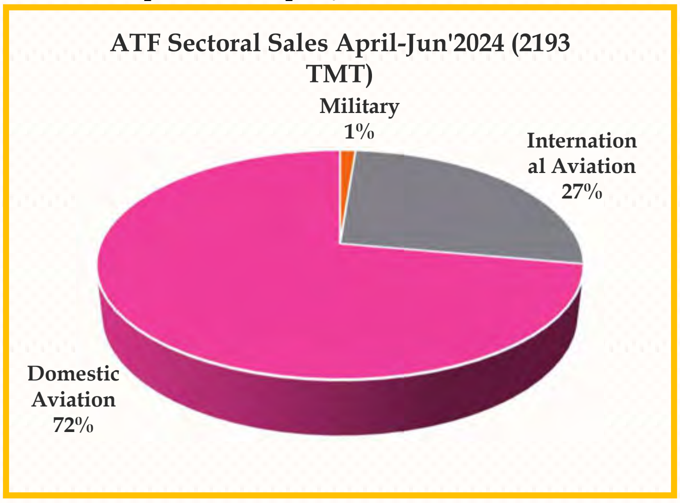
During 'April-Jun'25, total ATF domestic consumption with a volume of 2.28 MMT registered 3.9% growth Year-on Year basis over the volume of 2.19 MMT in 'April-Jun-24.

Almost entire ATF consumption during 'April-Jun-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-Jun-25 and its comparison to 'April-Jun-24





Note : The above sectorisation is not basis tax applicability and is as provided by OMCs

During the month of May 2025, all operational airports (taken together) handled 249.24 thousand aircraft movements (excluding General Aviation Movements), 35.38 million passengers and 328.36 thousand tonnes of freight.

The International aircraft movements, domestic aircraft movements and total aircraft movements have increased by 9.4%, 4.3% and 5.1% respectively during (April-May) 2025-26 as compared to (April-May) 2024-25.

The International passengers traffic, domestic passengers and total passenger traffic have increased by 8.8%, 6.1% and 6.6% respectively during the period (April-May) 2025-26 as compared to (April-May) 2024-25.

The International freight traffic, domestic freight and total freight traffic have increased by 7.7%, 8.8% and 8.1% respectively during the period (April- May) 2025-26 as compared to (April- May) 2024-25.

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

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

CATEGORY	May		%
	2025-26	2024-25	CHANGE
Aircraft Movements (in '000)			
International	81.09	74.14	9.4
Domestic	416.22	398.9	4.3
Total	497.3	473.04	5.1
General Aviation	57.57	47.06	22.3
Grand Total(INTL+DOM+Gen)	**554.87**	**520.1**	**6.5**

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								
May								
REGION	May		Change	REGION	May		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	3338	3708	-10.0%	EASTERN	466	407	14.6%	-24.6%
NORTH EAST	154	132	16.7%	NORTH EAST	822	739	11.3%	5.4%
NORTHERN	22931	21449	6.9%	NORTHERN	78	72	9.3%	-2.4%
SOUTHERN	35172	30934	13.7%	SOUTHERN	707	666	6.0%	7.7%
WESTERN	19492	17919	8.8%	WESTERN	575	508	13.2%	-4.4%
Total	**81087**	**74142**	**9.4%**	**Total**	**2648**	**2391**	**10.4%**	**-1.0%**

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 June 2025 with a volume of 0.509 MMT and de-growth of 11.5% over the volume of 0.575 MMT in Jun-2024.

Reduction in the imports of FO/ LSHS also contributed in the de-growth in these POL.

The consumption is dropping as a result of the shift to lower emission fuels. Natural gas, for example, has been more widely available as a result of the ban on FO in different states of the country, including the NCR states. Due to environmental concerns, some businesses switched from FO to cleaner fuels . All big states consumption states Gujrat / West Bengal / AP showing negative growth in FO / LSHS

Some 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%.

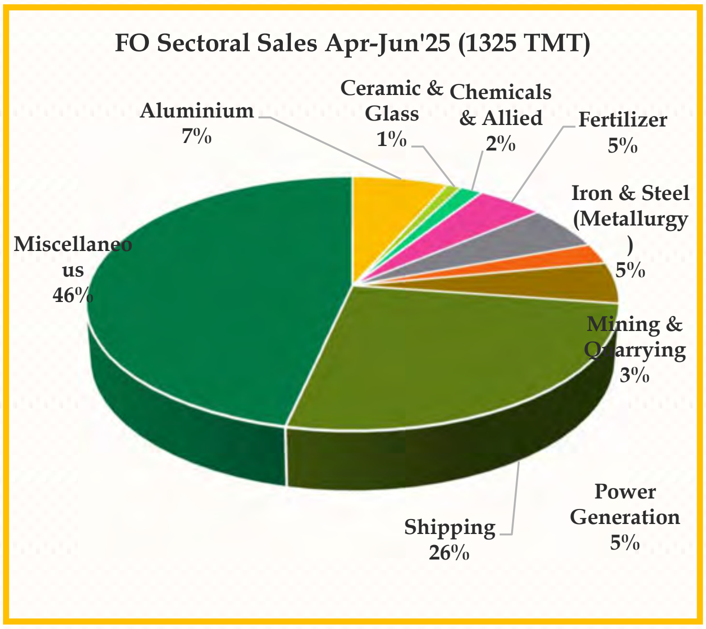
Sectoral consumption of FO/LSHS:

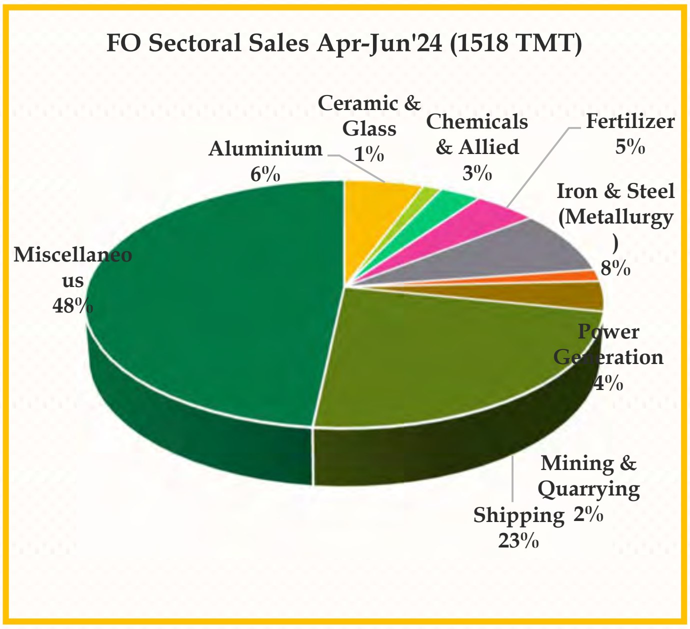
During 'April-Jun'25, total FO/LSHS consumption with a volume of 1.51 MMT with a de-growth of 12.3% Year-on Year basis over the volume of 1.28 MMT in 'April-Jun'24.

Further Product wise consumption for FO Apr-Jun'25 was 1.3 MMT vs 1.5 MMT in Apr-Jun'24 (12.3% de-growth). For LSHS, Apr-Jun'25 was 0.18 TMT vs 0.22 TMT in Apr–Jun'24 (17.5 % De-growth)

Details YoY comparisons are pictorially presented in the following figure.

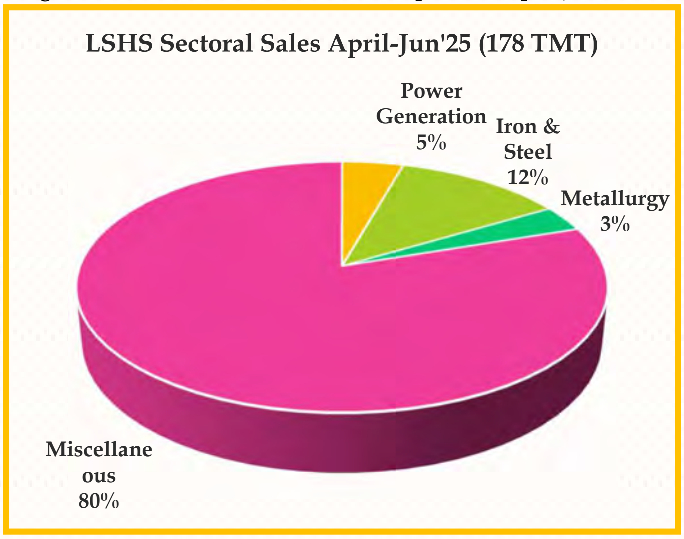
Figure-U: Sector wise FO+LSHS consumption of 'April-Jun'25 and its comparison to 'April-Jun'24

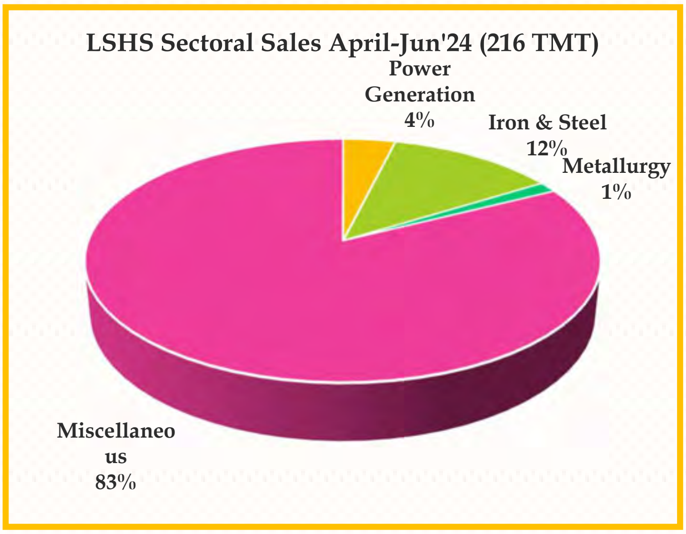




Apr-Jun'25:- Shipping sector has a share of 26%, up from 23% from previous period, follow by Iron & steel, fertilizer and Aluminium.	**Apr-Jun'24:-** Shipping contributes the highest share with 23% followed by Iron & Steel, Aluminiun Glass, Fertlizer & Power generation.

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





April-Jun'25:- Iron & Steel sector contributed to be the largest sector followed with 12% by Power Generation 5%	**April-jun'24:-** Iron & steel contributes the highest share with 12% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of Jun 2025 with a volume of 1.82 MMT and growth of 18.9% over the volume of 1.53 MMT 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 with a flat growth of -0.2% in consumption of petcoke in this sector for Jun 25 .

•Few Small scale industries like Iron & steel etc use petcoke as a fuel, as also gassified for synthetic gas production.

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

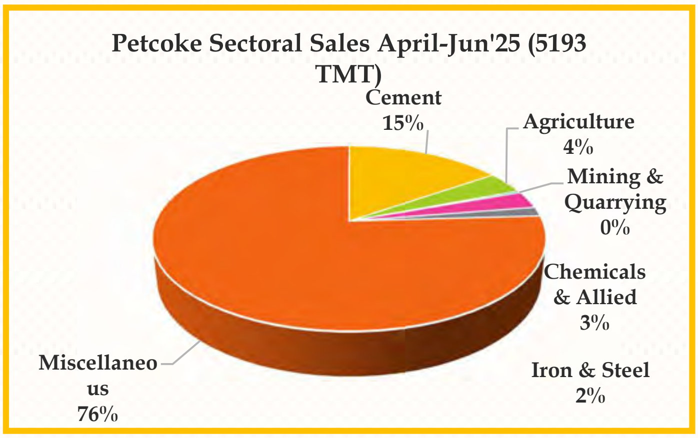
Sectoral consumption of Petcoke:

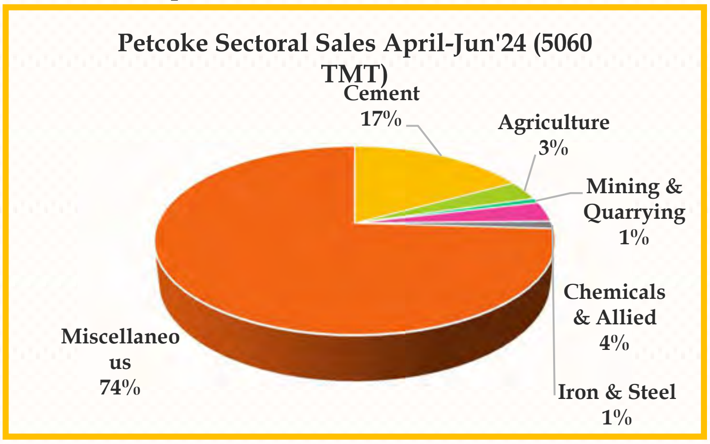
During 'April-Jun-25', total petcoke cummulative domestic consumption with a volume of 5.13 MMT registered 2.6% growth Year-on Year basis over the volume of 5.06 MMT in 'April-Jun-24'.

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

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

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





April-Jun'25:-	April-Jun'24:-
Cement industry occupied the highest share at 15%, followed by other sectors, down from 17% during last year.	Cement industry occupied the highest share at 17%, followed by other sectors.

Light Diesel Oil

LDO consumption during the month Jun 2025 with a volume of 0.086 MMT registered a 32.8% growth over the volume of 0.065 MMT in Jun 2024.

Jun 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.

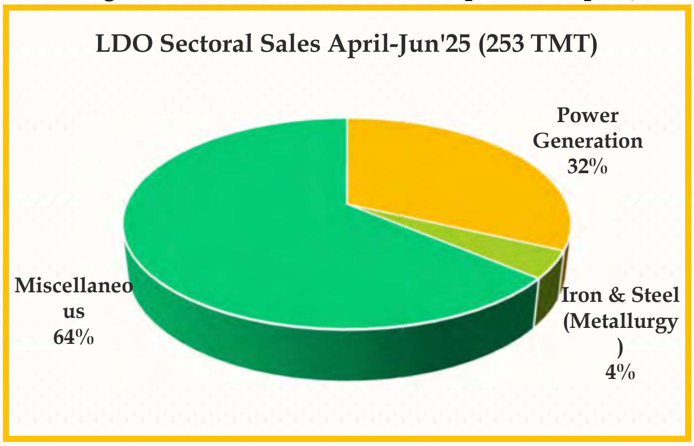
Sectoral consumption of Light Diesel Oil:

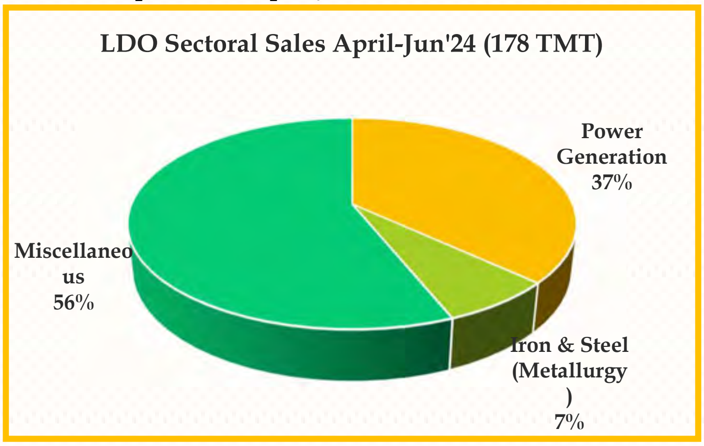
During 'April-Jun-25, total LDO domestic consumption with a volume of 0.25 MMT registered a 41.8% growth Year-on Year basis over the volume of 0.18 MMT in 'April-Jun-24.

The cumulative consumption of Light Diesel oil (LDO) during 'April-Jun'25' was driven by 'Power Generation' 32% followed by Iron & Steel at 4%.

Detailed comparisons are pictorially presented in the following figure

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





April-Jun 25:- Power Generation occupied a 32% share for the product followed by Iron & Steel & Misc industries	**April-Jun24:-** Power Generation occupied a 37% 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.

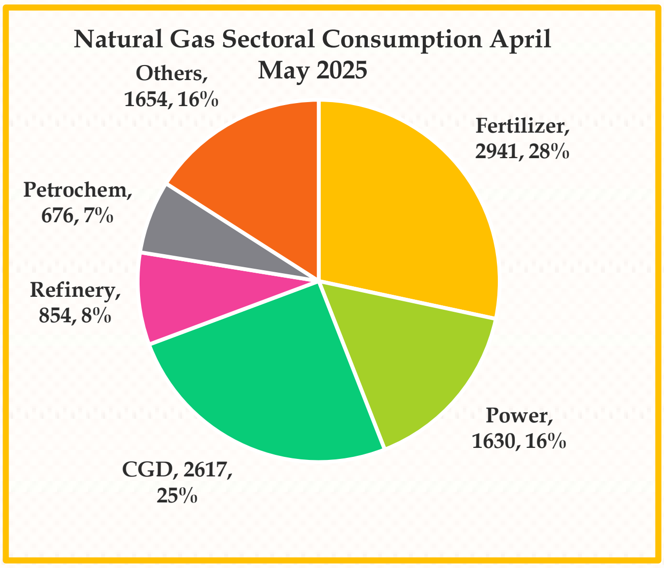
"Total Natural Gas Consumption (including internal consumption) for the month of June 2025 was 5860 MMSCM which was 10% higher than the corresponding month of the previous year. The cumulative consumption of 17448 MMSCM for the current financial year till June 2025 was higher by 0.8 % compared with the corresponding period of the previous year.

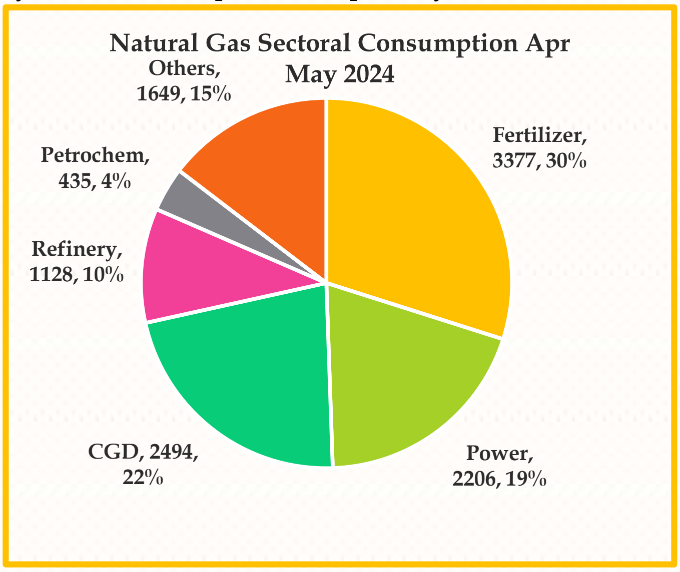
Sectoral consumption of Natural Gas consumption of 'April-May'25'& its comparison to 'April-May'24: (PROVISIONAL)

During April-May25, total Natural Gas monthly domestic consumption with a volume of 10,371 MMSCM, over the volume of of 5,359 MMSCM during the same period in the preceeding year

During April-May'25, consumption of Natural gas (NG) was driven by fertilizer (28%) followed by CGD (25%), Power (16%) Refinery (8%), Petrochemicals (7%). Misc sectors occupied a share of 16% in April-May2025.

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





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

P: provisional

April-May'2025	***April-May'2024***
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 28% 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-June 2025-26			June								
	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	7102	7734	8.9	2251	2225	2233	2320	2528	12.3	13.6	13.2	9.0
SKO	93	105	13.1	136	45	51	36	41	-69.9	-9.6	-19.9	12.5
Sub Total	**7196**	**7839**	**8.9**	**2388**	**2271**	**2284**	**2356**	**2569**	**7.6**	**13.1**	**12.5**	**9.0**
(B) Major Decontrolled Product												
HSD	24319	24961	2.6	6195	7674	7906	7982	8107	30.9	5.6	2.5	1.6
MS	10044	10753	7.1	2409	2968	3152	3296	3522	46.2	18.6	11.7	6.8
Naphtha	3321	2956	-11.0	1088	948	1057	1014	1028	-5.4	8.5	-2.7	1.4
ATF	2193	2278	3.9	257	588	642	707	730	184.1	24.2	13.7	3.3
Bitumen	2519	2351	-6.7	570	690	752	744	683	19.9	-0.9	-9.1	-8.1
FO & LSHS	1727	1514	-12.3	504	550	511	575	509	0.9	-7.5	-0.5	-11.5
Lubricants & Greases	1282	1154	-10.0	316	290	319	436	388	22.7	33.7	21.9	-11.0
LDO	178	253	41.8	94	57	66	65	86	-8.3	50.6	30.6	32.8
Sub Total	**45583**	**46220**	**1.4**	**11434**	**13766**	**14405**	**14819**	**15054**	**31.7**	**9.4**	**4.5**	**1.6**
Sub - Total (A) + (B)	**52778**	**54060**	**2.4**	**13821**	**16037**	**16689**	**17175**	**17623**	**27.5**	**9.9**	**5.6**	**2.6**
(C) Other Minor Decontrolled Products												
Petroleum coke	5060	5193	2.6	1004	1297	1596	1532	1821	81.3	40.4	14.1	18.9
Others	3342	2584	-22.7	866	1191	1198	1230	869	0.3	-27.0	-27.5	-29.4
Sub Total	**8403**	**7777**	**-7.4**	**1871**	**2488**	**2794**	**2762**	**2690**	43.8	8.1	-3.7	-2.6
Total	**61181**	**61837**	**1.1**	**15692**	**18525**	**19483**	**19937**	**20313**	**29.4**	**9.7**	**4.3**	**1.9**

*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-June 2025-26			June								
	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	0.90	0.98	8.9%	0.87	0.86	0.86	0.90	0.98	12.3%	13.6%	13.2%	9.0%
SKO	0.01	0.0093	13.1%	0.04	0.01	0.01	0.01	0.01	-69.9%	-9.6%	-19.9%	12.5%
Sub Total	**0.9**	**1.0**	**8.9%**	**0.9**	**0.9**	**0.9**	**0.9**	**1.0**	**9.0%**	**13.3%**	**12.7%**	**9.0%**
(B) Major Decontrolled Product												
HSD	2.01	2.06	2.6%	1.57	1.95	2.01	2.02	2.06	30.9%	5.6%	2.5%	1.6%
MS	0.97	1.04	7.1%	0.71	0.88	0.93	0.98	1.04	46.2%	18.6%	11.7%	6.8%
Naphtha	0.31	0.28	-11.0%	0.32	0.28	0.31	0.29	0.30	-5.4%	8.5%	-2.7%	1.4%
ATF	0.19	0.20	3.9%	0.07	0.16	0.17	0.19	0.20	184.1%	24.2%	13.7%	3.3%
Bitumen	0.17	0.15	-6.7%	0.11	0.14	0.15	0.15	0.14	19.9%	-0.9%	-9.1%	-8.1%
FO & LSHS	0.13	0.11	-12.3%	0.11	0.12	0.11	0.13	0.11	0.9%	-7.5%	-0.5%	-11.5%
Lubricants & Greases	0.10	0.09	-10.0%	0.08	0.07	0.08	0.11	0.09	22.7%	33.7%	21.9%	-11.0%
LDO	0.01	0.02	41.8%	0.02	0.01	0.02	0.02	0.02	-8.3%	50.6%	30.6%	32.8%
Sub Total	**3.9**	**4.0**	**1.6%**	**3.0**	**3.6**	**3.8**	**3.9**	**4.0**	**32.2%**	**9.9%**	**4.8%**	**1.9%**
Sub - Total (A) + (B)	**4.8**	**4.9**	**3.0%**	**3.9**	**4.5**	**4.7**	**4.8**	**5.0**	**26.8%**	**10.5%**	**6.3%**	**3.3%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.30	0.31	2.6%	0.18	0.24	0.29	0.28	0.34	81.3%	40.4%	14.1%	18.9%
Others	0.29	0.23	-22.7%	0.23	0.32	0.32	0.33	0.23	0.3%	-27.0%	-27.5%	-29.4%
Sub Total	**0.6**	**0.5**	**-9.8%**	**0.4**	**0.6**	**0.6**	**0.6**	**0.6**	**36.2%**	**1.8%**	**-7.6%**	**-7.2%**
Total	**5.4**	**5.48**	**1.6%**	**4.3**	**5.0**	**5.3**	**5.4**	**5.5**	**27.7%**	**9.6%**	**4.7%**	**2.1%**
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.												

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