INDUSTRY CONSUMPTION REPORT POL & NG

May 2025

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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: May 2025

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of May 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, Joint. 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: May 2025

- India's Goods and Services Tax (GST) Revenue for May 2025 stood at Rs. 2,01,000 crores, marking a 16.4% increase from Rs. 1,74,000 crores in May 2024, as indicated by the country's gross and net GST collections data.

- Union Minister for Petroleum & Natural Gas, Shri Hardeep Singh Puri, chaired the Consultative Committee meeting of the Ministry of Petroleum and Natural Gas highlighted India's remarkable progress in energy affordability, access, and infrastructure development.

- India is poised to lead the global economy once again, with the International Monetary Fund (IMF) projecting it to remain the **fastest growing major economy** over the next two years .

- CPI inflation dropped to 2.8% in May 2025 and IIP stands at 2.7 % in May 2025 .

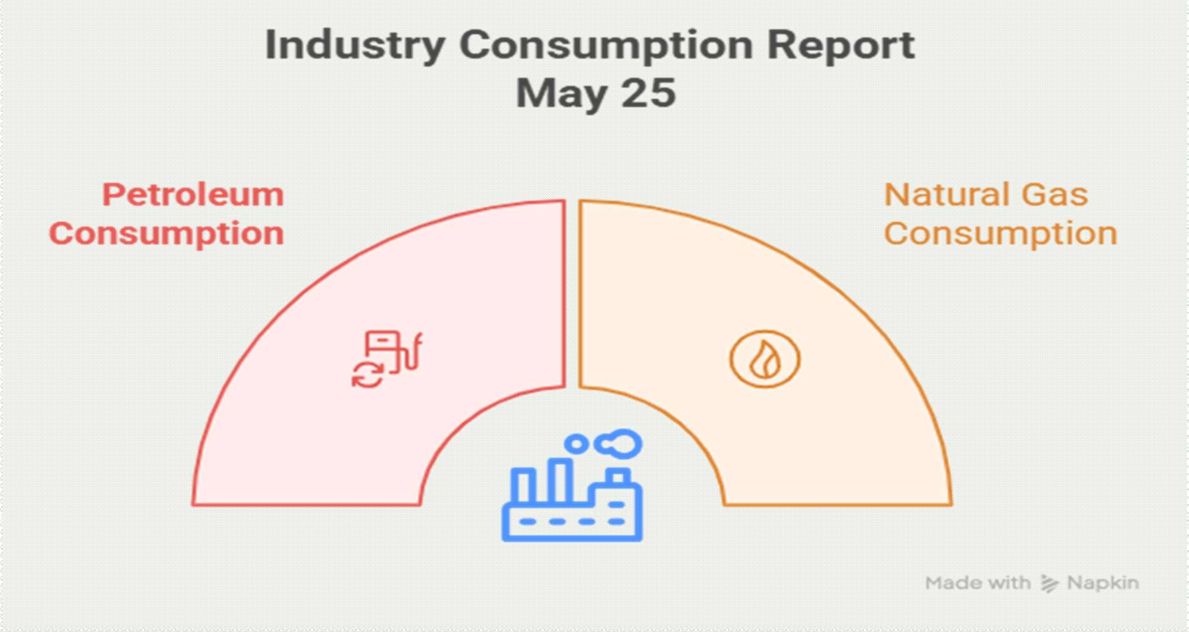
- Power consumption in India dipped over 4 per cent to 148.71 billion units in May 2025, compared to the same month a year ago, due to the early arrival of the monsoon and unseasonal rains.Power consumption in May 2024 was 155.15 billion units. The peak demand of 231 GW was recorded on 15 May .

- Cabinet approves two multitracking projects across Indian Railways in Maharashtra and Madhya Pradesh. The projects include Ratlam- Nagda and Wardha- Balharshah are essential routes for transportation of commodities such as coal, cement, clinker, gypsum, fly ash, containers, agriculture commodities, and Petroleum products . The capacity augmentation works will result in additional freight traffic of magnitude 18.40 MTPA (Million Tonnes Per Annum) .

- The Railway Board has set a target to carry 1,702.5 million tonnes (MT) of freight in the financial year 2025-26 with growth of 5.2 over 24-25 .

- India plans to invest US$ 10 billion to acquire 112 crude oil tankers by 2040 to enhance energy security and reduce dependence on foreign-owned fleets.

- A significant step towards India's Climate Action for fostering National Determined Contributions (NDCs) targets and to achieve net zero decarbonisation pathways **,**Department of Science and Technology (DST) recently unveiled a pioneering national initiative ,five Carbon Capture and Utilisation (CCU) testbeds in the Cement Sector.



SUMMARY OF PRODUCT WISE POL

1. The consumption of petroleum products in May 2025 with a volume of 21.32 MMT registered a growth of 1.1% against the historical of 21.08 MMT in May 2024.

2. MS (Petrol) consumption during the month of May 2025 with a volume of 3.78 MMT (1.08 mbpd) recorded a growth of 9.2% on the volume of 3.46 MMT (0.99 mbpd) in May 2024.

3. 'Ethanol blending in Petrol was 19.8% during May'25 and cumulative ethanol blending during November 2024- May'2025 was 18.8%.

4. The Domestic Sale of Passenger Vehicles in May 2025 with a volume of 3.00 lacs registered 0.8% growth over May 2024, as per SIAM with SUV the driver for the growth.

5. HSD (Diesel) consumption during the month of May 2025 with a volume of 8.59 MMT (2.11 mbpd) registered growth of 2.2% over the volume of 8.41 MMT (2.06 mbpd) in the month of May 2024.

6. LPG consumption during the month of May 2025 with a volume of 2.66 MMT registering a growth of 10.4% over the volume of 2.41 MMT in May 2024. LPG has been growing since last year riding on growth in PMUY segment.

7. ATF consumption during May 2025 with a volume of 0.78 MMT continued to register a growth of 4.3%, over a volume of 0.74 MMT during the month of May 2024.

8. Bitumen consumption during May 2025 with a volume of 0.80 MMT registered a de-growth of 14.5% over the volume of 0.94 MMT in the month of May 2024.

9. Kerosene (SKO) consumption with a volume of 0.04 MMT registered a growth of 28.8% in May 2025 as compared to May 2024. SKO consumption during the month is largely constituted by PDS category with a 55% share.

10. 'Total Natural Gas Consumption (including internal consumption) for the month of May 2025 was 5918 MMSCM which was 10% lower than the corresponding month of the previous year. The cumulative consumption of 11764 MMSCM for the current financial year till May 2025 was lower by 1.8 % compared with the corresponding period of the previous year.

11. As on 31st May 2025, number of active LPG domestic connections are 33.02 cr and PMUY connections 10.33 cr.

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

Product	May				April-May			
	2024	2025	% share of May'25	Growth (%)	2024-25	2025-26	Growth (%)	% share of Apr-May'25
(A) Sensitive Products								
LPG	2410	2660	12.5	10.4	4783	5181	8.3	12.5
SKO	30	39	0.2	28.8	57	64	13.5	0.2
Sub Total	**2440**	**2698**	**12.7**	**10.6**	**4840**	**5245**	**8.4**	**12.6**
(B) Major Decontrolled Product								
HSD	8412	8593	40.3	**2.2**	16337	16857	**3.2**	40.6
MS	3463	3782	17.7	**9.2**	6747	7232	**7.2**	17.4
Naphtha	1090	998	4.7	**-8.5**	2307	1930	**-16.4**	4.7
ATF	744	776	3.6	**4.3**	1486	1547	**4.1**	3.7
Bitumen	940	803	3.8	**-14.5**	1775	1599	**-9.9**	3.9
FO/LSHS	617	510	2.4	**-17.4**	1144	1002	**-12.4**	2.4
Lubes+Greases	471	365	1.7	**-22.4**	846	697	**-17.6**	1.7
LDO	62	81	0.4	**30.0**	113	167	**47.0**	0.4
Sub Total	**15799**	**15908**	**74.6**	**0.7**	**30756**	**31030**	**0.9**	**74.8**
(C) Other Minor Decontrolled Products								
Pet.Coke	1723	1833	**8.6**	**6.4**	3528	3518	**-0.3**	**8.5**
Others*	1119	878	**4.1**	**-21.5**	2120	1692	**-20.2**	**4.1**
Sub Total	**2842**	**2711**	**12.7**	**-4.6**	**5648**	**5210**	**-7.8**	**12.6**
Total	**21080**	**21318**	**100**	**1.1**	**41244**	**41485**	**0.6**	**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 April'25-May'25, which may undergo change on receipt of actual data), and

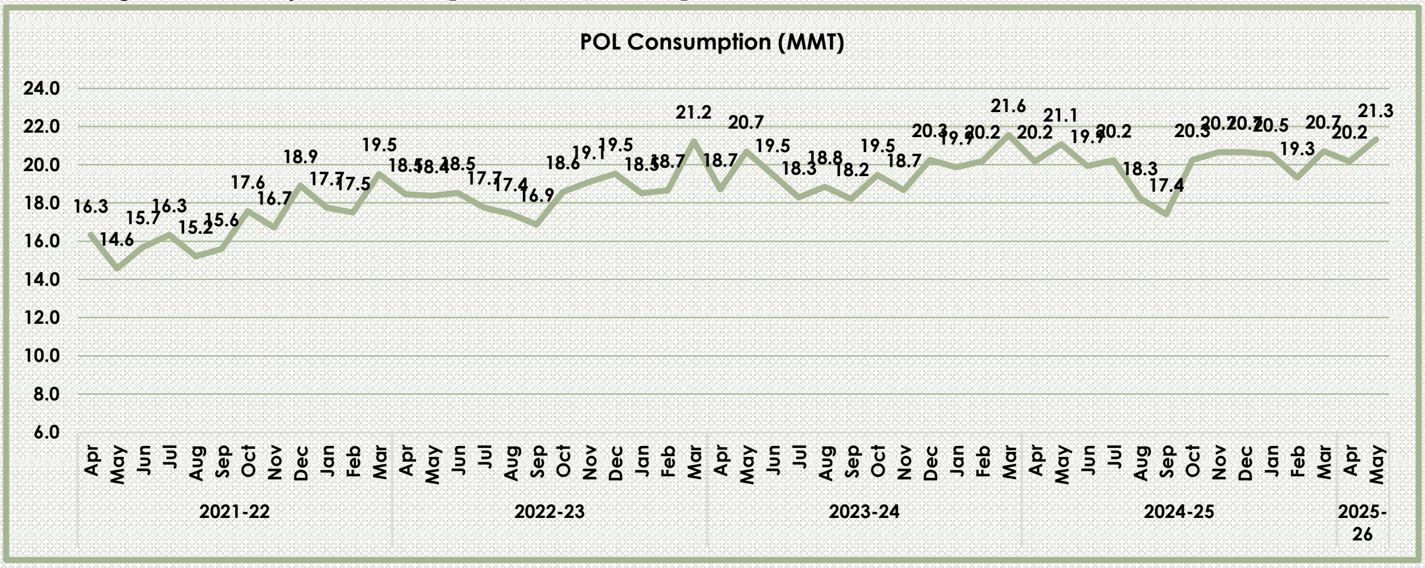
(c) sales by SEZ units in Domestic Tariff Area (DTA) are provisional due to portal upgrade.

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 May 2025 with a volume of 21.32 MMT growth by 1.1% over the volume of 21.08 MMT in May 2024. Growth in the POL was driven by growth in MS at 9.2%, ATF at 4.3%, LPG at 10.4% and HSD at 2.2%.

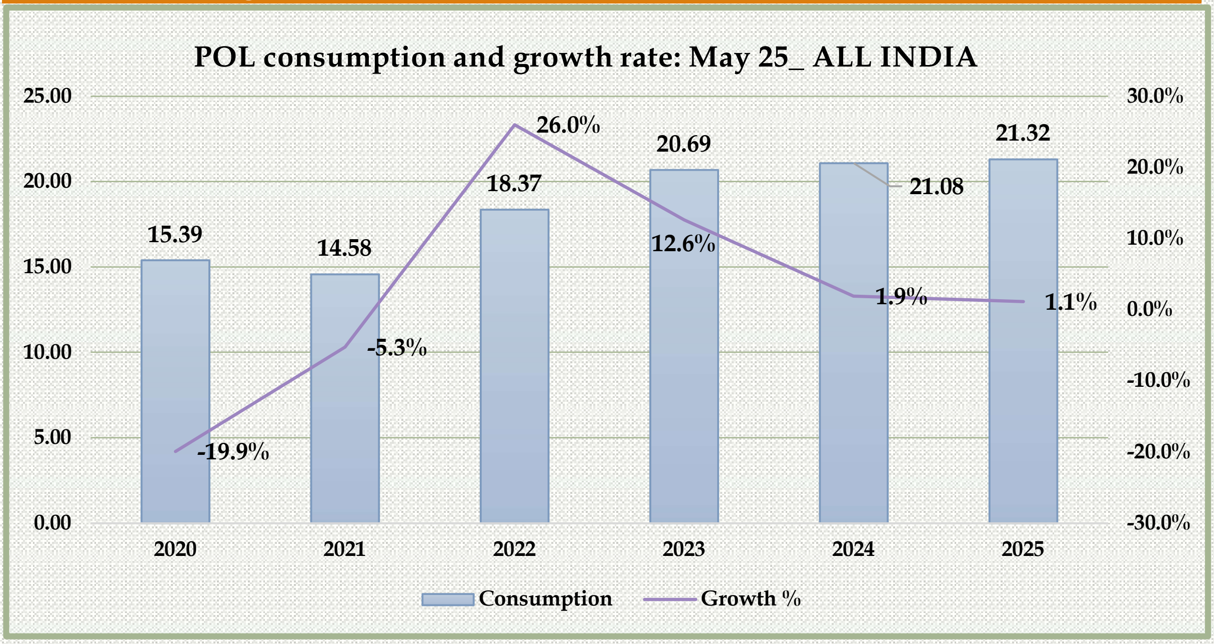
Pan India based domestic POL monthly consumption trend since April-2021 is shown in Figure-A.

Figure-A: **Monthly POL consumption (MMT) since April 2021**



- ✓ The overall POL domestic consumption profile of the May 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):

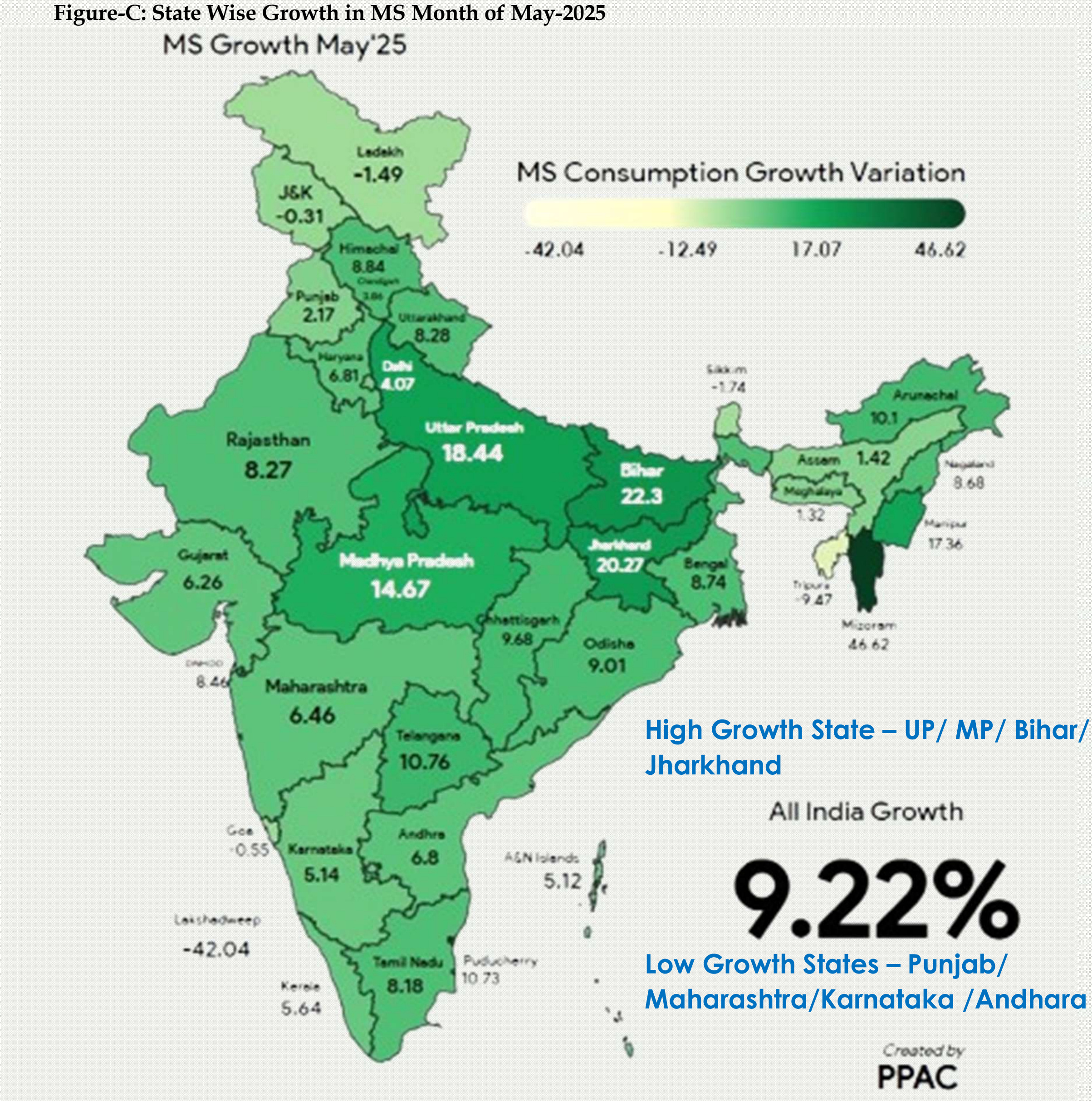
MS (Petrol) consumption during the month of May 2025 with a volume of 3.78 MMT recorded a growth of 9.2% on the volume of 3.46 MMT in May 2024.

PSU's registered a growth rate of 8.0% as against 22.3% achieved by their private sector counterparts in May-25. Market share held by PSU reduced by 1.06% (90.14% 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:

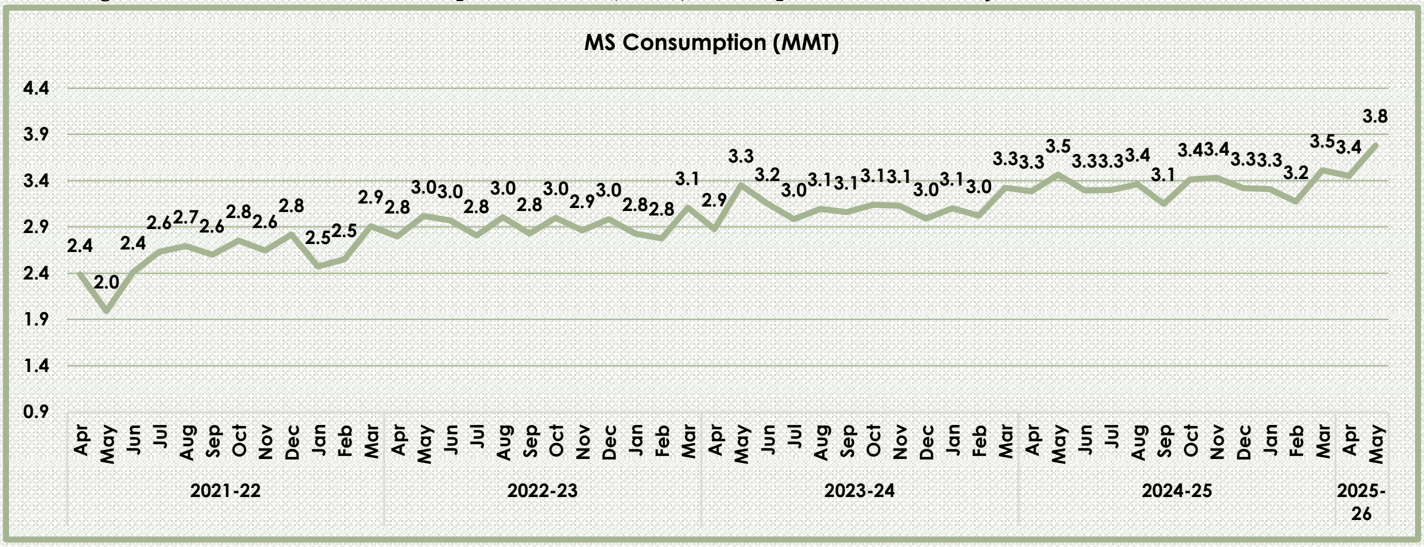
- The growth in MS sales was primarily driven by the summer travel season being a key contributing factor alongwith higher vehicle sales and increased mobility .
- With 15 auspicious days in May 2025, marriage season contributed heavily in high consumption of MS .
- Continued growth in Petrol SUV segment contributed to higher growth of MS .

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



Pan India based domestic MS monthly consumption trend since April 2021 is shown in Figure-D

Figure-D: Month wise MS consumption volume (MMT) since April- 2021 to till May-2025



Factors impacting consumption of MS:
Passenger Vehicle Sales:

The Sale of Passenger Vehicles in May 2025 at 3.03 lacs registered 0.8% growth YoY basis over sale of 3.01 lacs in the month of May 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 MAY 2025 (Primary sales data)

Vehicle Segment	May 25		
	2024	**2025**	**Growth %age**
Passenger Cars	1,06,952	93,951	-12.2%
Utility Vehicles	1,82,883	1,96,821	7.6%
Vans	10,960	12,327	12.5%
Total PV	**3,00,795**	**3,03,099**	**0.8%**

Source: SIAM (BMW, Mercedes, JLR, Tata Motors and Volvo Auto data not available)

Two-Wheeler Sales:

Two-wheeler sales in May 2025 with a volume of 16.55 lacs registered 2.2 Growth, YoY basis over volume of 16.21 lacs during May 2024, as shown in the following table-3.

Three-Wheeler sales

Three-wheeler domestic sales in May 2025 with a volume of 0.54 lac recorded a de-growth of 3.3%, YoY basis over the volume of 0.56 lac in May 2024, as shown in the following table-3

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

Vehicle Segment	May'25		
	2024	**2025**	**Growth %age**
Scooters/Scotrette	5,40,866	5,79,507	7.1%
Motor Cycles/Step-Throughs	10,38,824	10,39,156	0.0%
Mopeds	40,394	37,264	-7.7%
Total Two Wheelers	**16,20,084**	**16,55,927**	**2.2%**
Passenger Carrier-3 wheeler	45,445	44,354	-2.4%
Goods Carrier-3 wheeler	8,863	8,720	-1.6%
E-Rickshaw	1,203	720	-40.1%
E-cart	252	148	-41.3%
Total Three Wheelers	**55,763**	**53,942**	**-3.3%**

Source: SIAM

High Speed Diesel (HSD):

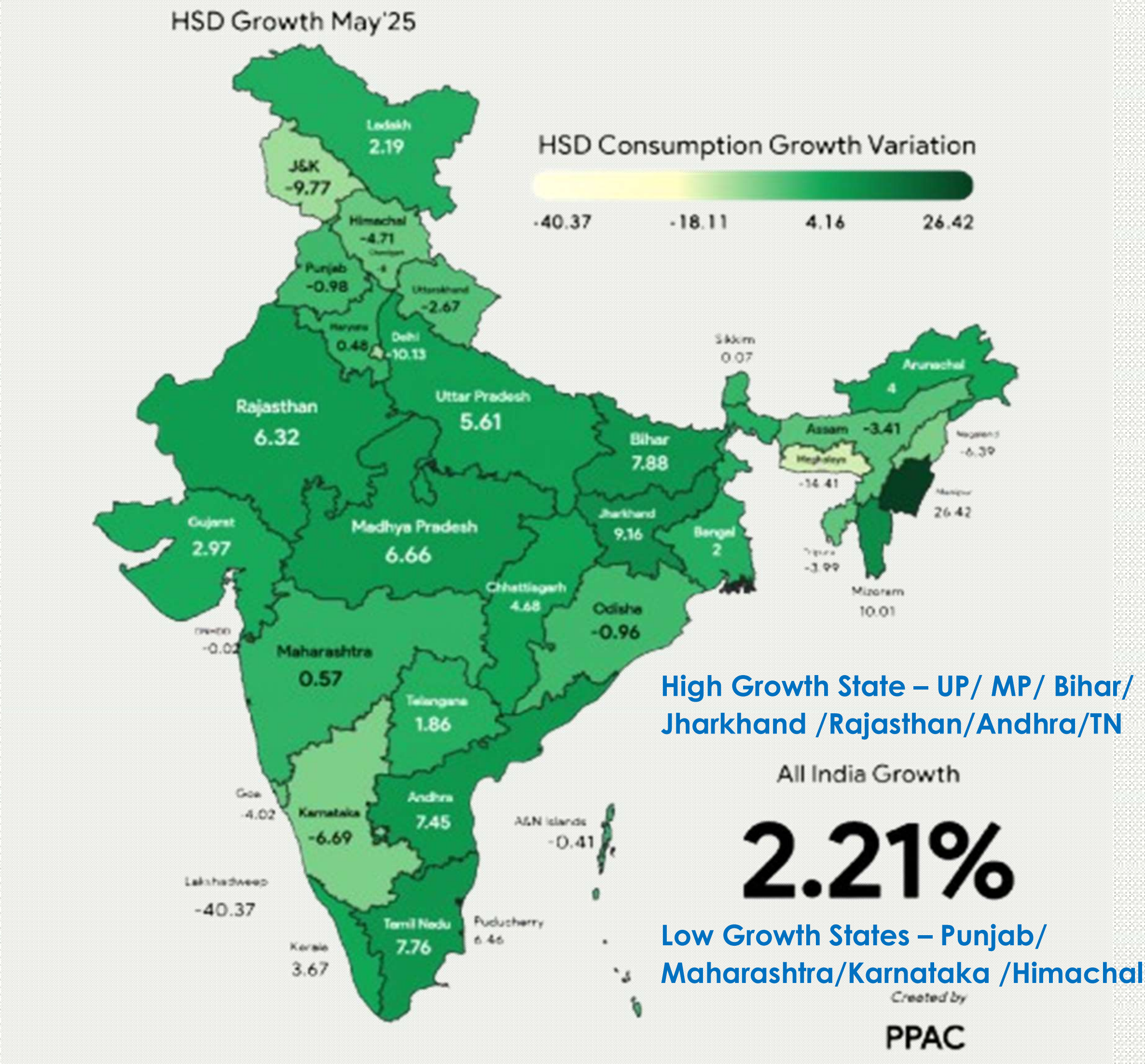
HSD (Diesel) consumption during the month of May 2025 with a volume of 8.59 MMT, registered a growth of 2.2% on the volume of 8.41 MMT in the month of May 2024.

- PSU's registered a 0.8% growth their private sector counterparts in the month of May-25.
- Market share held by PSU reduced by 1.19% (87.28% 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:

- Moderate growth in retail segment of HSD buoyed with demand from the agricultural sector with healthy growth in direct segment mainly from from the defence, contributed to growth.
- High growth in major volume states like UP, Rajasthan, Bihar, M.P, Chattisgarh and Tamil nadu on account of infrastructure and mining activity contributed to the growth of HSD in may 2025.
- Increased GSTN & e-way bills point towards increased freight activity coupled with higher rural consumption.

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



Pan India based domestic HSD monthly consumption since Apr-21 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 2021

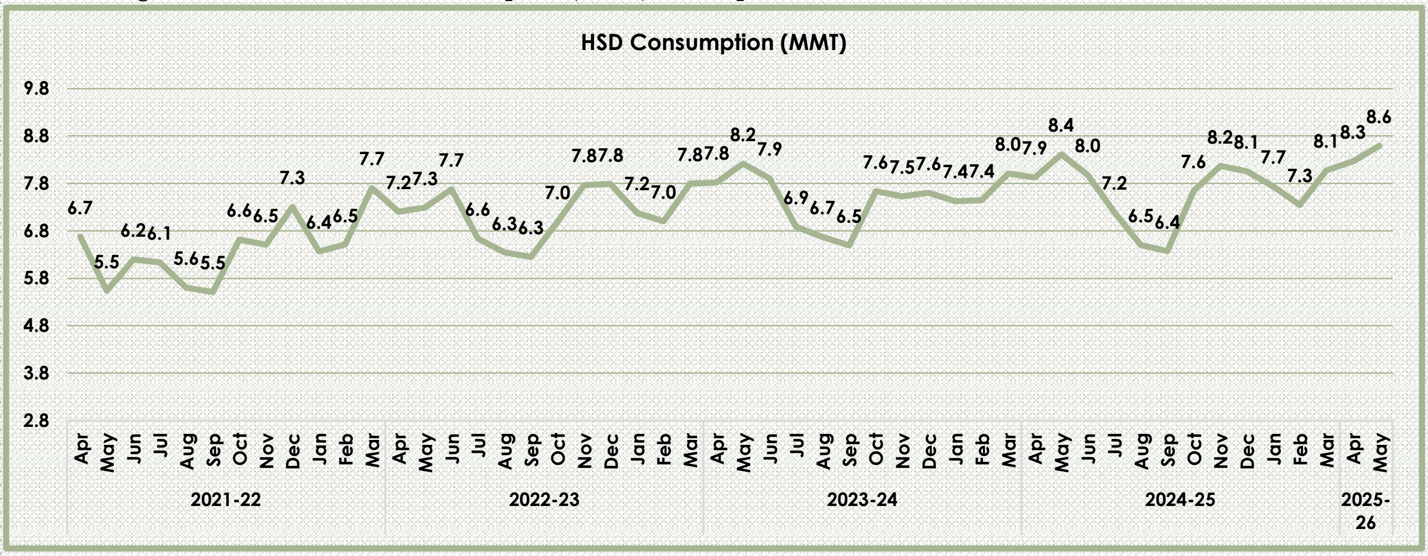
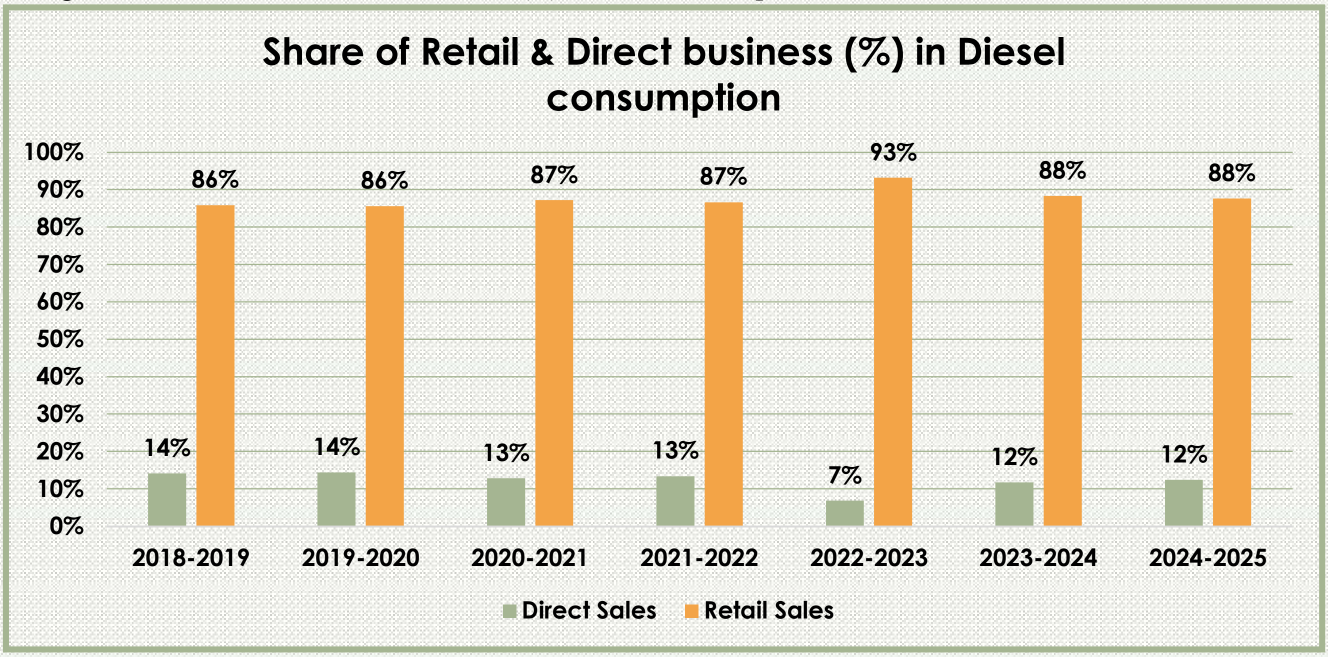
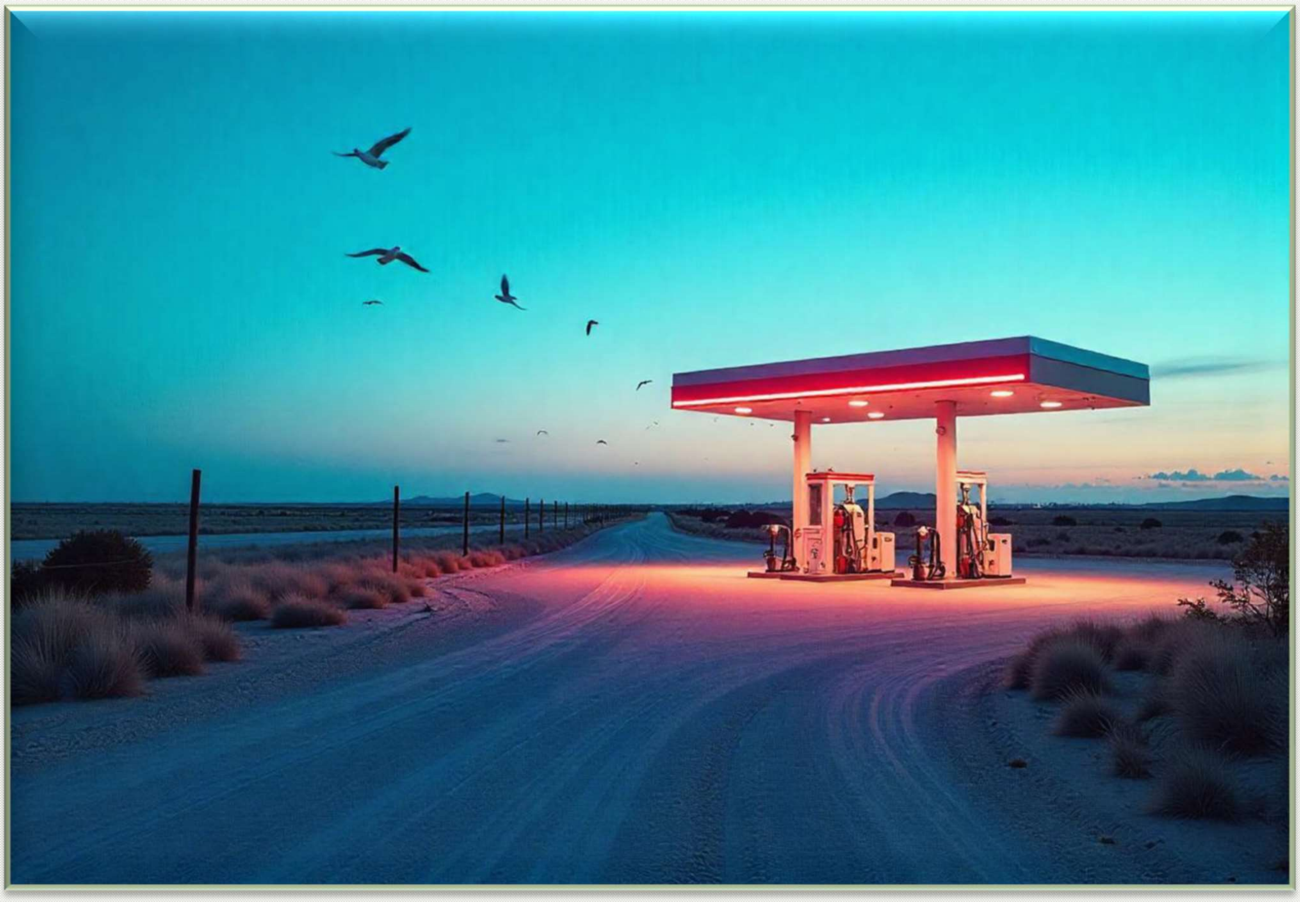


Figure-G: Share of Retail & Direct business (%) in Diesel consumption





Factors impacting consumption of HSD:

Weather

May was unusually cool, thanks to early southwest monsoon showers and persistent thunderstorms. Most places recorded below-average maxima (3–5 °C lower) with some northern cities facing their coldest May in decades. Heatwave days were sharply reduced, though isolated heat persisted in parts of Rajasthan around late May due to brief dry spells.

Frequent western disturbances triggered unseasonal rainfall and thunderstorms, helping prevent early snowmelt. Elevated cloud cover and precipitation brought some relief, though hit early summer crops, reducing sunshine hours.

Instead of intense heatwaves, the region experienced widespread cooling from monsoon influence. Rainfall jumped to historic highs—May 2025 saw the heaviest rains since 1901—bringing respite from April's scorching conditions but also posing flood risks for certain crops and low-lying areas.

Rajasthan witnessed an early burst of thunderstorms and dust storms, triggering short-term relief. However, trailing dry days rekindled heatwave conditions in isolated pockets towards month-end.

Heavy, sporadic thunderstorms and heavy showers dominated. While daytime peaks stayed subdued, lingering humidity made conditions sultry. Rain helped ease soil moisture stress but challenged harvesting operations.

The month began hot and humid, but an early monsoon surge—marked by heavy rains and cooler spells—brought a distinct drop in thermal stress. Kerala heralded monsoon onset on May 27, about five days early, beneficial for kharif sowing.

Unseasonal rain, early monsoon, and fewer heatwaves defined the month. India recorded its wettest May since 1901, with widespread relief from April's heat, boosting water availability and aiding agriculture.

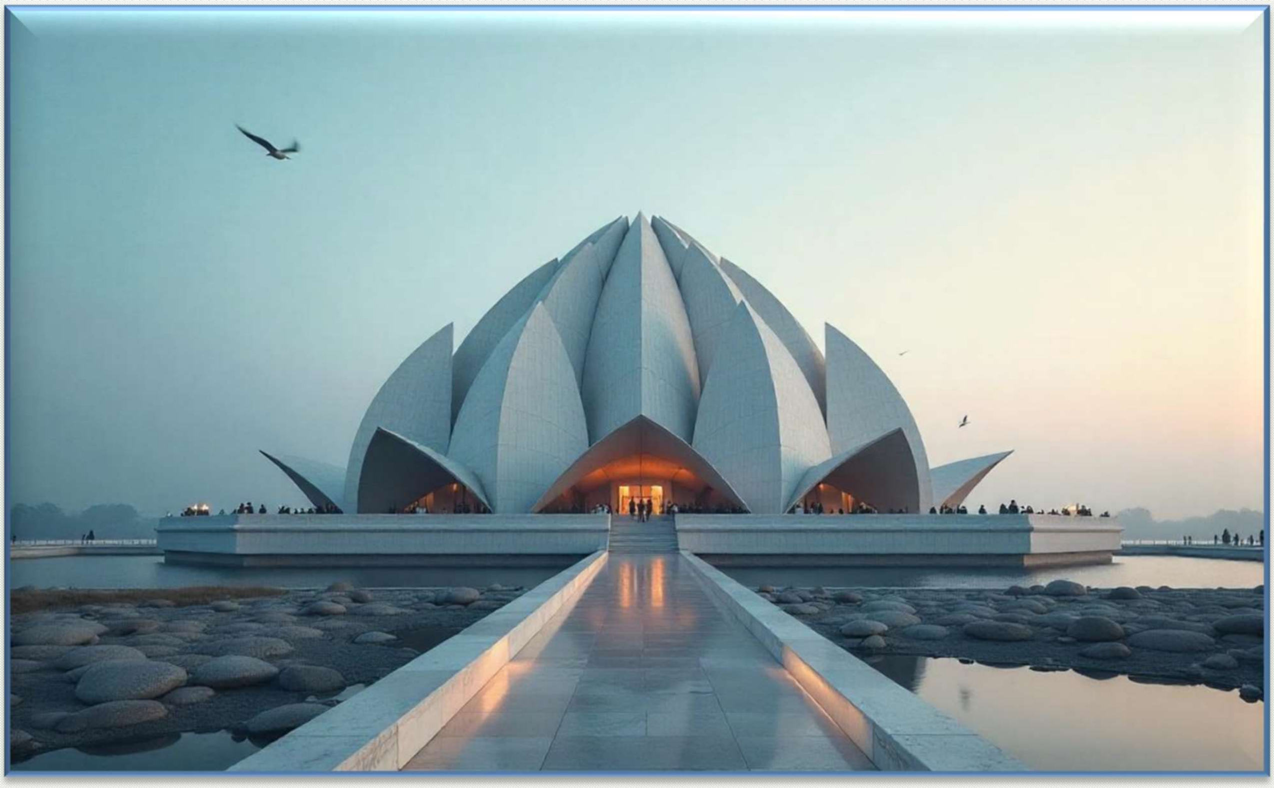


Figure- H: Sub-Division Rainfall Map for May 25 vs May 24. (Sourcew : Indian Metreological Department)

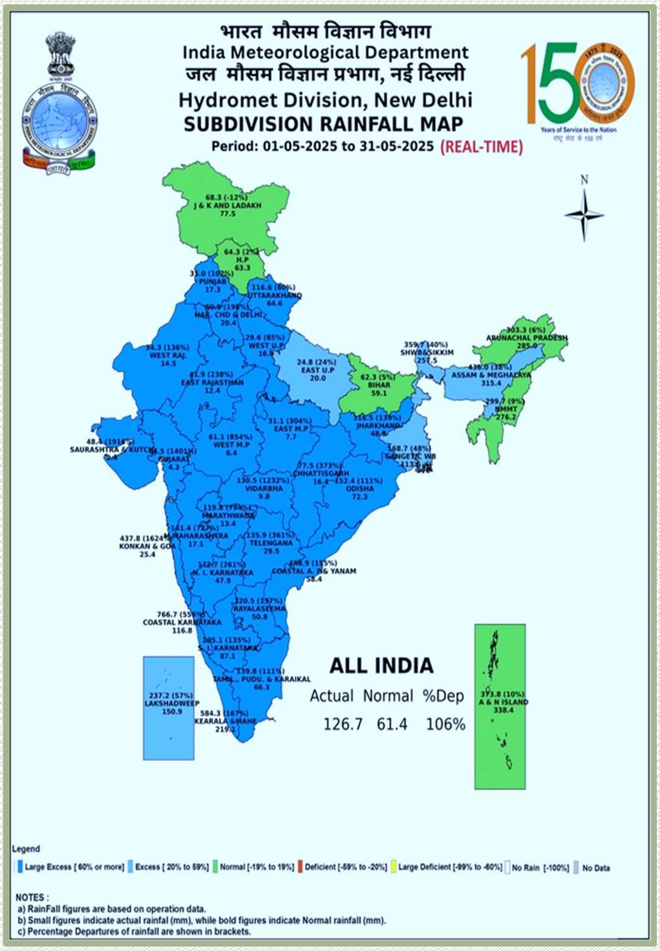


Table-4 Details of the Total E-Way Generated in CY vis-a-vis LY :

(No of Eway Bills Generated in Lakhs)

Month	May-25	May-24	Variance	Apr-May 25	Apr-May 24	Growth
Intra State	801.72	674.24	19%	1,571.90	1,300.68	20.9%
Inter State	424.81	357.39	19%	847.29	697.48	21.5%
Total	**1,226.52**	**1,031.62**	**19%**	**2,419.18**	**1,998.16**	**21.1%**

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 de-growth of 3.7% as compared to May 2024 as shown in Table-5

Tractor Sale:

Tractor domestic sales in May 2025 with a volume of 71,992 registered a growth of 2.8% over the volume of 70,063 in May 2024.

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

Commercial vehicles & tractors		May'25		
		2024	2025	Growth %age
CV	LCV	45,870	44,419	-3.2%
	MCV	6,359	6,772	6.5%
	HCV	26,234	24,382	-7.1%
	Others	67	42	-37.3%
Total CVs		**78,530**	**75,615**	**-3.7%**
Tractors		70,063	71,992	2.8%

Source: FADA research

Port Traffic:

The Major Ports achieved cargo throughput of 147.20 MMT during April-May'2025 which is 5.63% higher over same Period last year.

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

Ports	Apr-May'25	Apr-May'24	Growth (%)
Kolkata & Haldia	11252	8821	27.56
Paradip	26102	24943	4.65
Visakhapatnam	14260	14943	-4.57
Kamarajar (Ennore)	7683	7680	0.04
Chennai	9980	8687	14.88
V.O. Chidambaranar	6999	6966	0.47
Cochin	6009	6086	-1.27
New Mangalore	7441	6908	7.72
Mormugao	3165	3188	-0.72
Mumbai	11785	12085	-2.48
JNPA	16644	14607	13.95
Deendayal	25880	24446	5.87
Total:	147200	139360	5.63

POWER SITUATION:

India's peak demand for power degrew to 235.32 gigawatt (GW) in Apr-May'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 235.19 GW registered in Apr-May'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-May'25 stood at 235.32 GW, which is almost same as the Peak Demand.

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

Year	Energy				Peak			
	Requirement	Availability	Surplus(+)/Deficts(-)		Peak Demand	Peak Met	Surplus(+) / Deficts(-)	
	(MU)	(MU)	(MU)	(%)	(MW)	(MW)	(MW)	(%)
2021-22	226,581	225,889	-692	-0.3%	183,037	182,379	-658	-0.4%
2022-23	270,546	267,184	-3,362	-1.2%	215,888	207,231	-8,657	-4.0%
2023-24	267,260	266,585	-675	-0.3%	221,718	221,423	-295	-0.1%
2024-25	299,749	299,437	-312	-0.1%	249,856	249,854	-2	0.0%
2025-26	297,016	296,917	-99	0.0%	235,321	235,190	-131	-0.1%

SECTORAL CONSUMPTION OF HSD:

During 'April-May-25, HSD total consumption with a volume of 16.86 MMT registered 3.2%growth Year-on Year basis over the volume of 16.34 MMT in 'April-May-24.

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

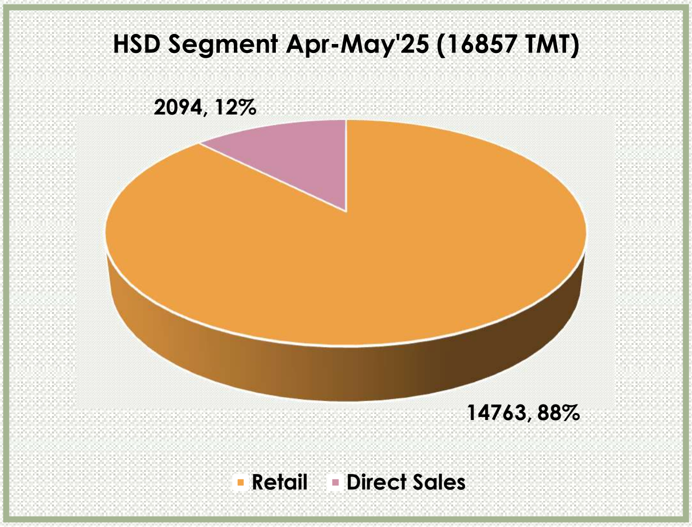
Growth of 3.2% during Apr-May'25 was driven by increased economic activity & freight movement, evident by a 23% jump in Inter-State E-way bill statistics.

In direct sales category, the sectoral consumption break up is shown in I(II) figure. i.e., for April-May-**25'** 'Road Transport' was 18%, the highest share followed by Mining 13%, Manufacturing at 12%, Shipping 7%, Agriculture 3% and Power Generation 2%. Railways share dropped from 12% to 9%. Retail sales continue to cater to mostly the road transport.

Also share of Road transport & shipping reduced by 21% & 18% respectively.

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

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



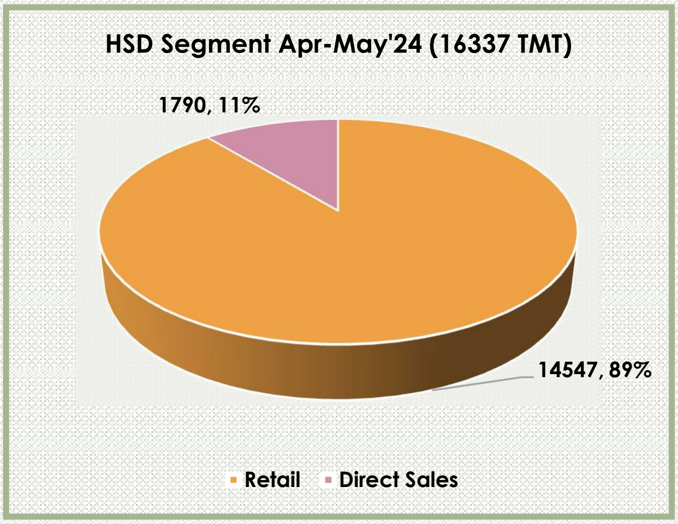
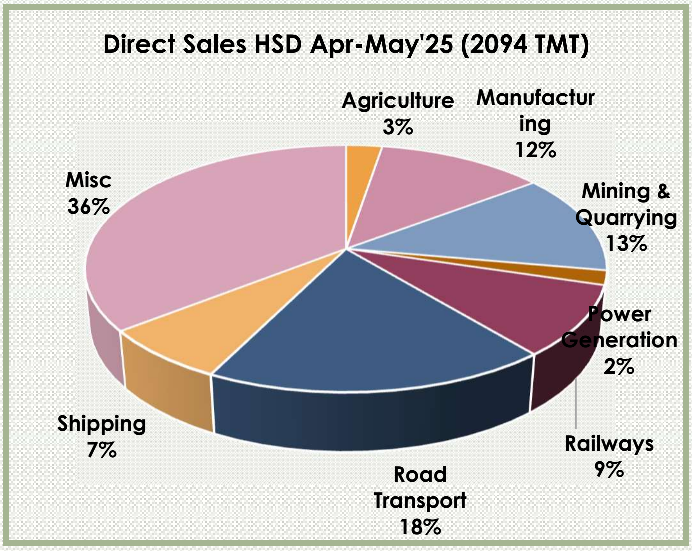
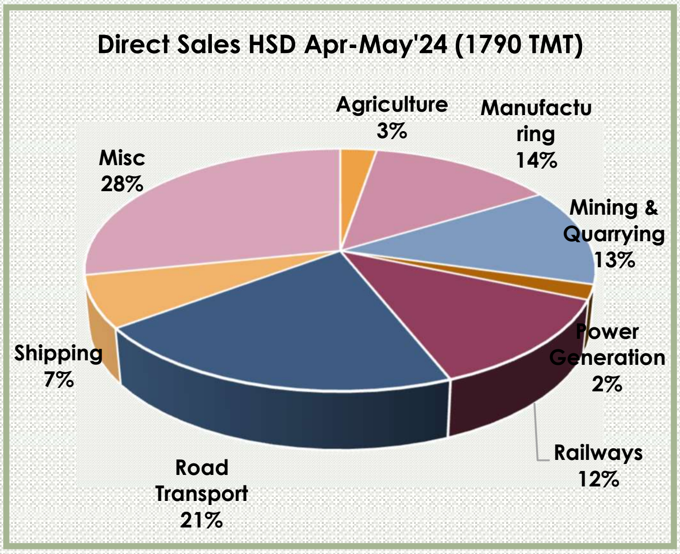


Figure-I(II): Sectoral HSD consumption Breakup in April-May'25 *and* its comparison with April-May'24





Share of Manufacturing has reduced 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 0.04 MMT registered a growth of 28.8% in May 2025 as compared to May 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 55% & 45% respectively for the month May 2025 as shown in the following figure-J.

Figure-J: Month-wise PDS & other-SKO consumption in share (%) since April 2021 to till date

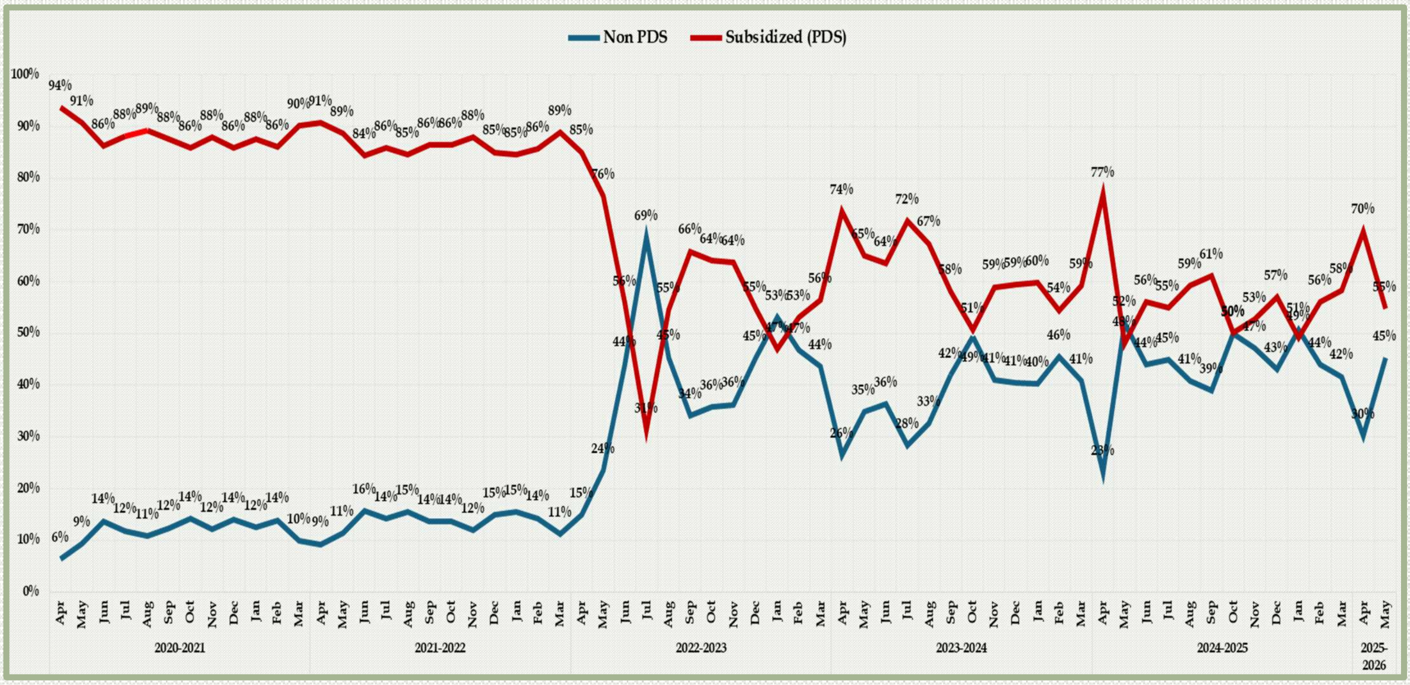
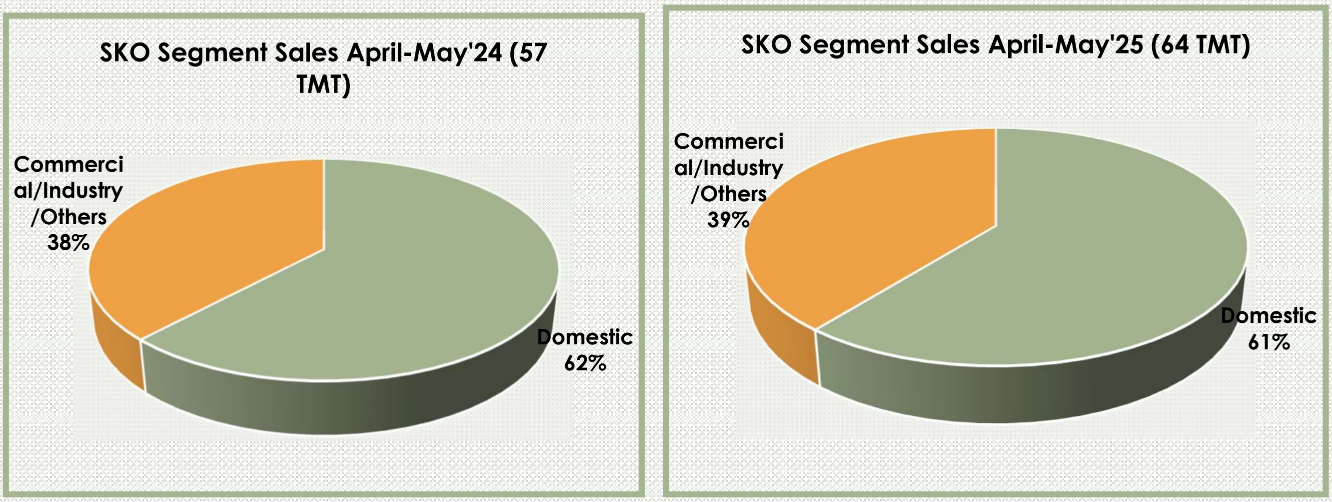


Figure-K: *Other SKO: non-subsidized PDS SKO +non-PDS kerosene



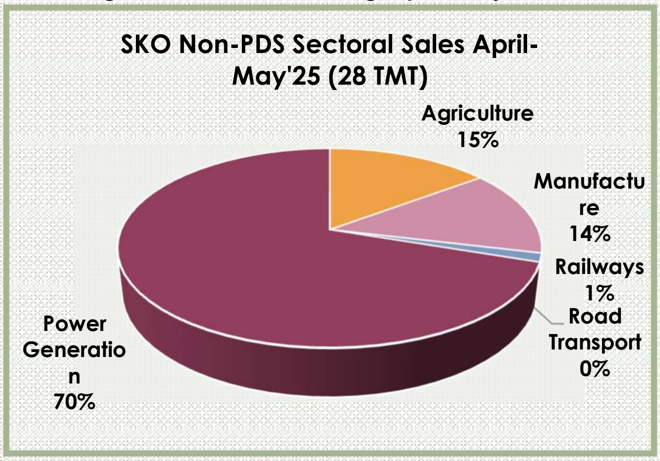
Sectoral consumption of SKO:

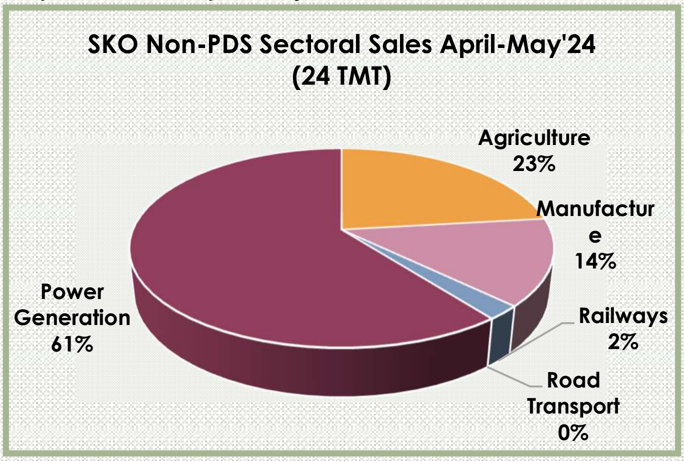
Out of total SKO sales during 'April-May'25 'PDS subsidized SKO' upliftment constituted to 55%. So far as sales in 'Other SKO' is concerned,' agriculture accounted for 15% share, Manufacturing 14%, and Miscellaneous applications at 70%.

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



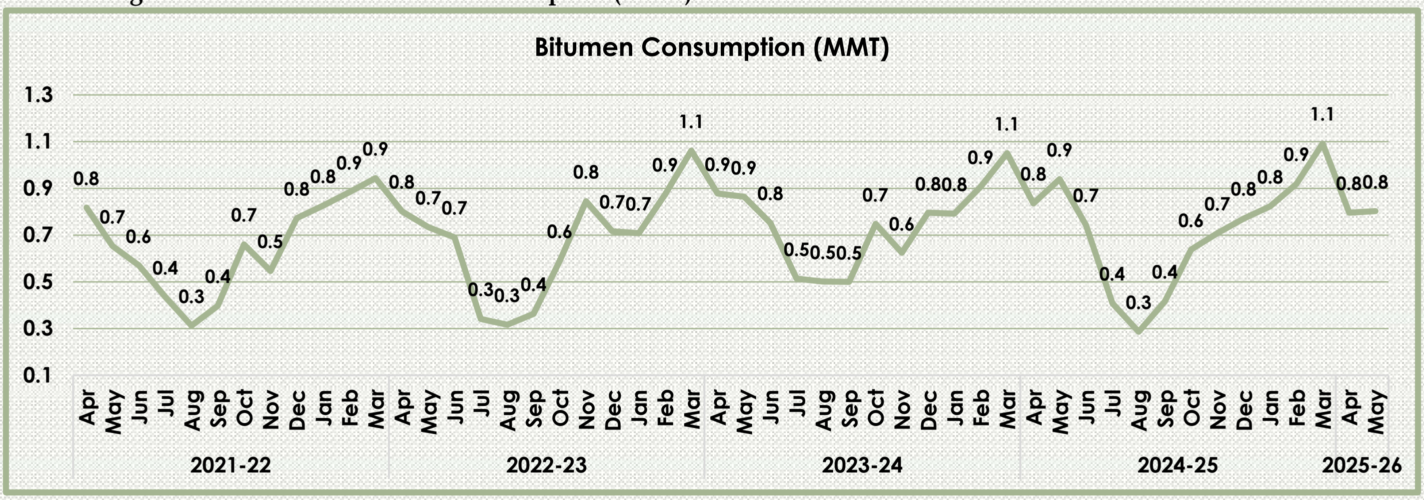


BITUMEN:

Bitumen consumption during May 2025 with a volume of 0.80 MMT registered de-growth of 14.5% over the volume of 0.94 MMT in the month of May 2024. De growth is primarily on account of low imports by pvt player and low road constructions activities in major states like Maharastra, Rajasthan. Rains dampened the bitumen demand.

Pan India based domestic Bitumen monthly consumption since April-21 is shown in the Fig-M.

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



Sectoral consumption of Bitumen:

During 'April-May-25, total bitumen consumption with a volume of 1.60 MMT registered a de-growth of 9.9% Year-on Year basis over the volume of 1.78 MMT in 'April-May-24.

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

.

LPG:

LPG consumption during the month of May 2025 with a volume of 2.66 MMT registered growth in the month at 10.4% over the volume of 2.41 MMT in the month of May 2024. LPG consumption during the month continues to be largely driven by higher consumption in PMUY domestic packed with a share of 85.5%.

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. 9.9% growth in Packed domestic LPG consumption in May'25 as compared to May'24.
2. 9.3% growth in Non-Domestic packed after a long period.
3. Under PMUY scheme 10.33 crores beneficiaries at the end of May 2025.
4. As on 1.06.2025, total active domestic connections in India are 3302.4 lakhs

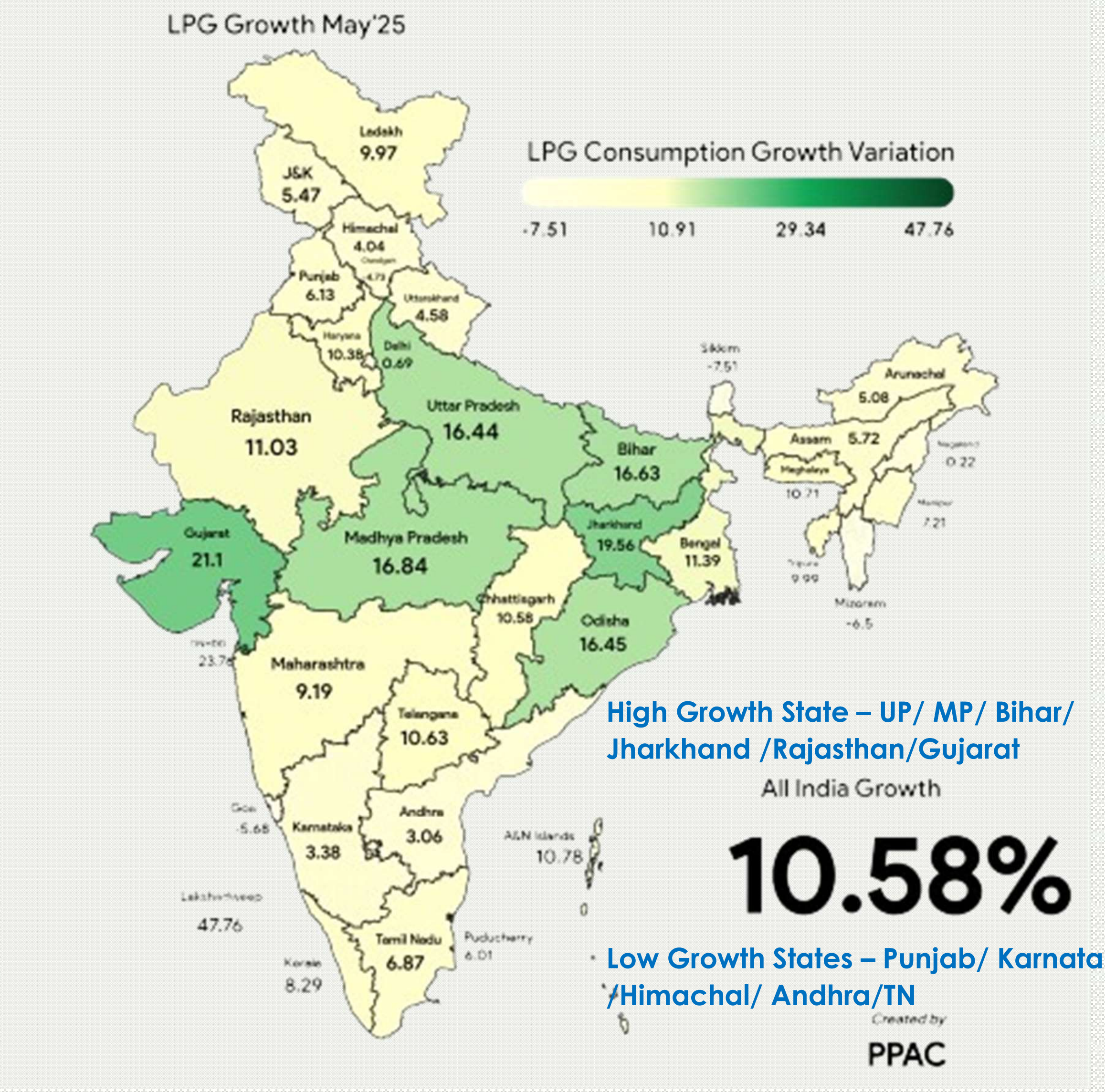
   Growth in consumption of domestic LPG in May`25 compared to May`24 are as follows:

   - PMUY cylinder available at Rs.553.00 in May'25 has led to an increase in rural consumption coinciding with the marriage season.
   - As of now, more than ~65.4% of non-PMUY consumers have DBCs connections and thus making a positive impact on LPG consumption. New connections ~88.0% issued with DBCs in May'25 (including SBC to DBC conversion).

5. 16.6 Crs cylinders of 14.2kg (~53.5 lacs/day) were delivered in May`25 compared to 15.1 Crs in May`24.
6. Growth of 66.3% in Bulk LPG consumption due to following reasons:

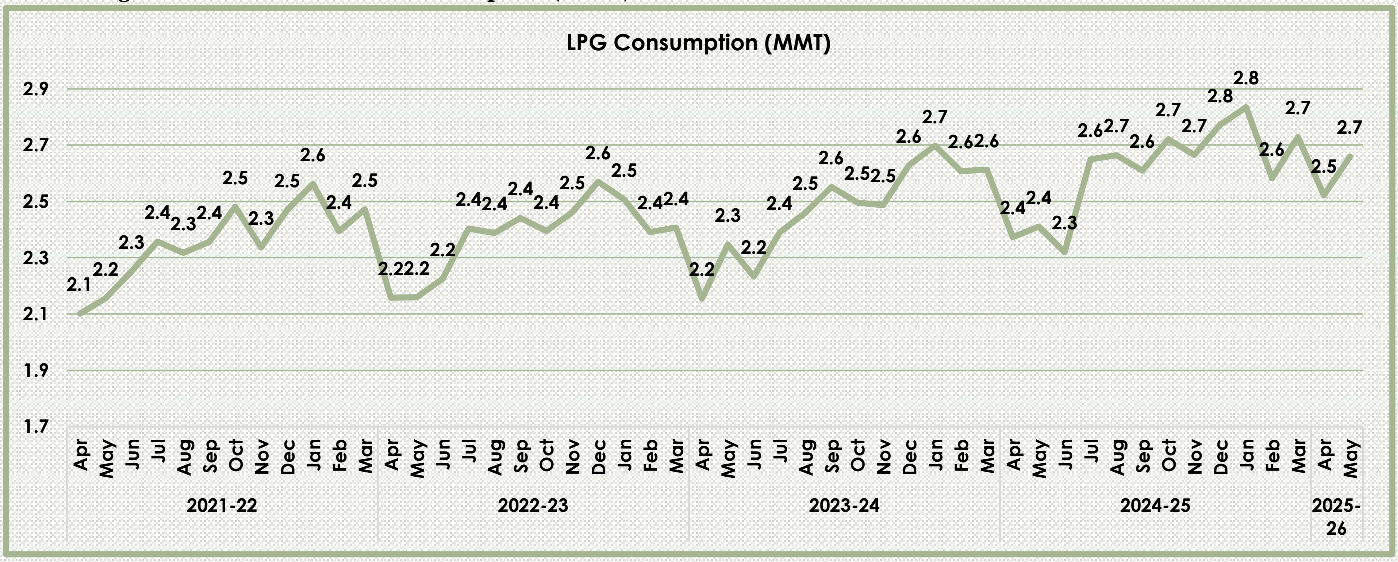
   - Last Year, NG prices were at par with LPG during Apr to June period, which made customers across the country (mainly in Morbi market) choose NG over LPG.
   - With higher Gas prices in Current period, customers have shifted to LPG for cost savings including GSTN input tax credit facility available on bulk LPG.
   - Little changes in price of bulk LPG in May'25 Rs. 76.2/kg as compared to May'24 rate was Rs. 74.9/kg.
   - Ceremic, Iron & steel units has shifted to bulk LPG due to the pricing advantage.

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



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

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

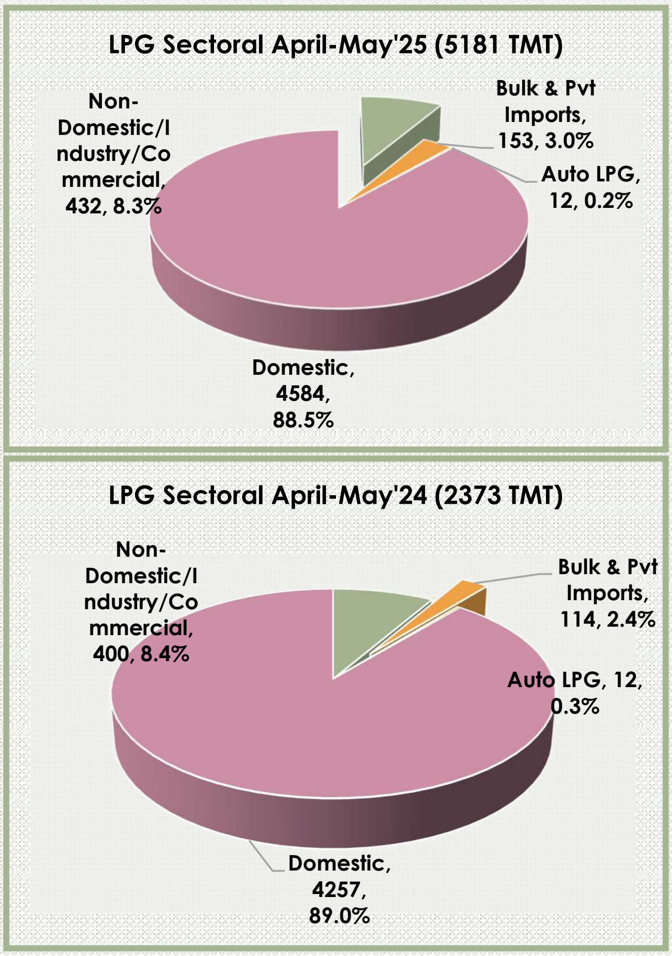


Sectoral consumption of LPG:

During 'April-May-25, total LPG domestic consumption with a volume of 5.18 MMT registered 8.3% growth Year-on Year basis over the volume of 4.78 MMT in 'April-May-24.

The Sectoral LPG consumption during 'April-May-25', was driven by Domestic packed at 88.5%, followed by LPG 'non-domestic/ industry/ commercial sector 8.3% & Bulk at 3.0%. Auto LPG at 0.2% has been on the negative trajectory getting displaced by CNG.

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



Naphtha:

Naphtha consumption during May 2025 with a volume of 1.00 MMT registered a de-growth of 8.5%, over a volume of 1.09 MMT during the month of May 2024.

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.

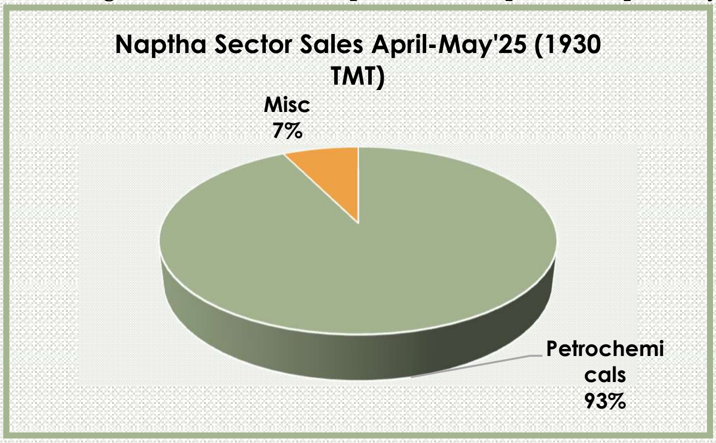
Sectoral consumption of Naphtha:

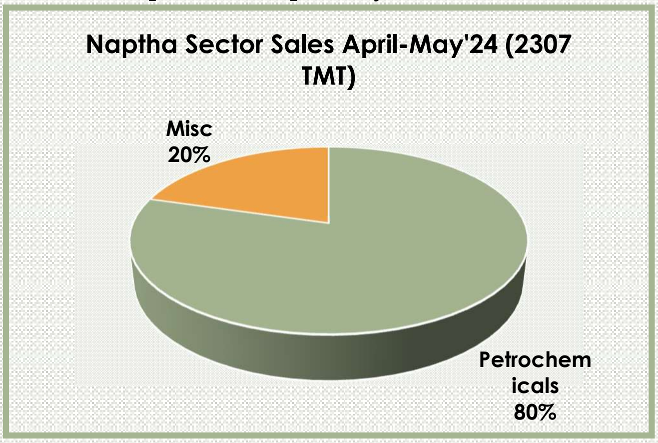
During 'April-May-25, total Naphtha domestic consumption with a volume of 1.93 MMT registered de-growth of 16.4% Year-on Year basis over the volume of 2.31 MMT in 'April-May-24.

Consumption of naphtha during this period was driven by petrochemicals sector 93%.

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

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



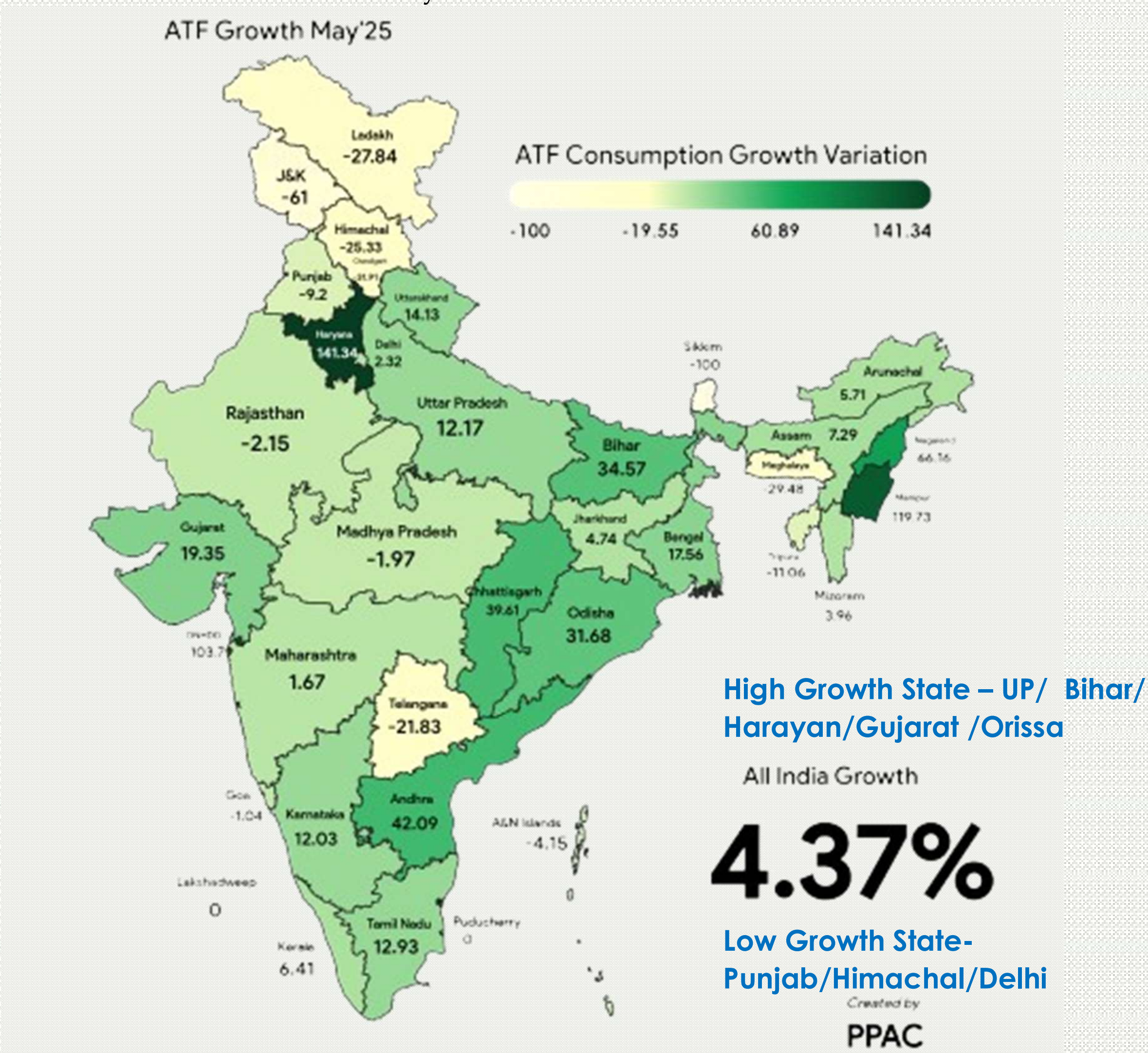


ATF:

ATF consumption during May 2025 with a volume of 0.78 MMT continued to registered a growth of 4.3%, over a volume of 0.74 MMT during the month of May 2024.

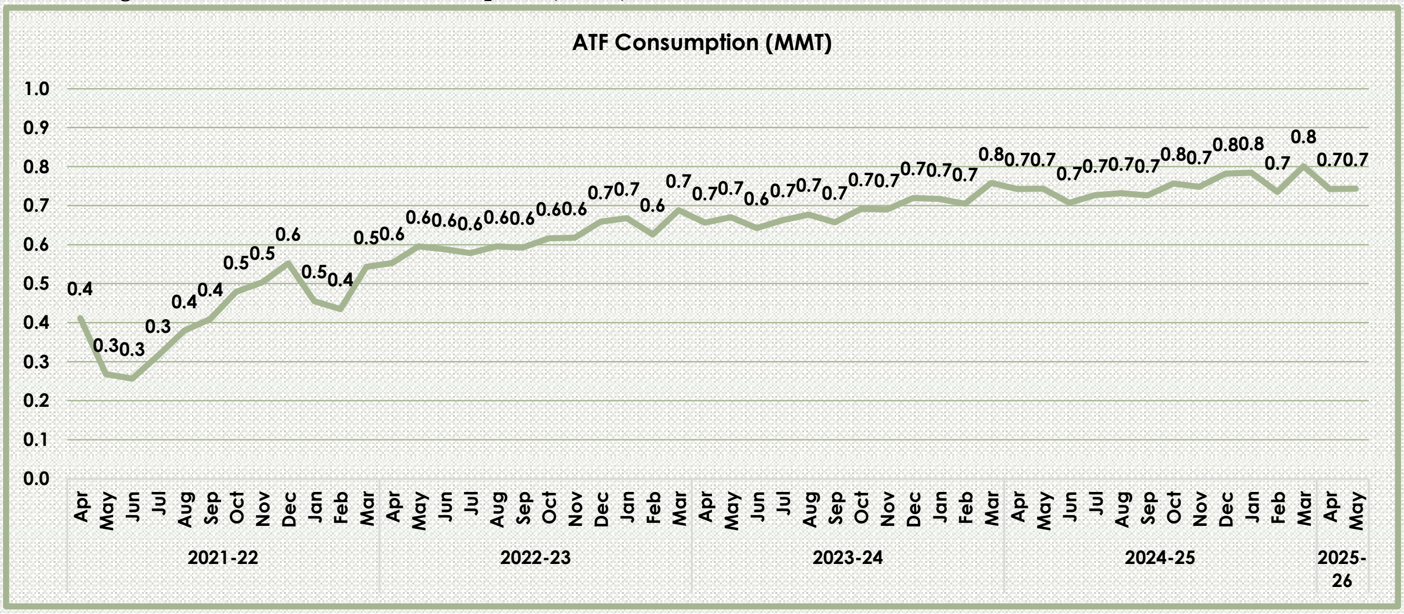
ATF sales growth remained subdued in May'25 at 4.3%, primarily due to temporary closure of airports and flight disruptions, particularly in the northern region, following Operation Sindoor.

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



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

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



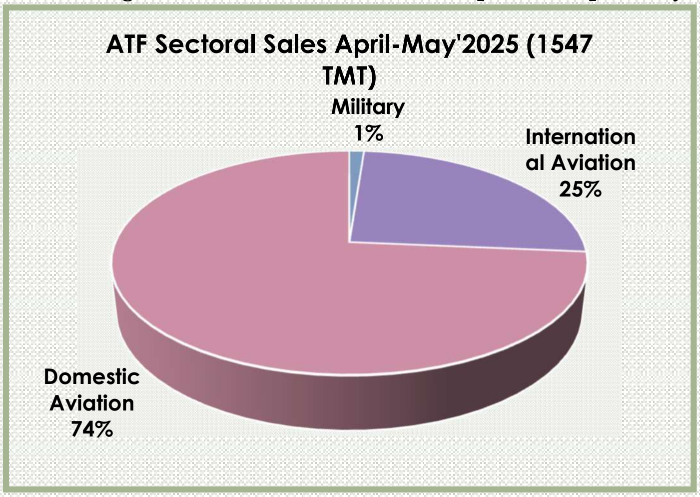
Sectoral consumption of ATF:

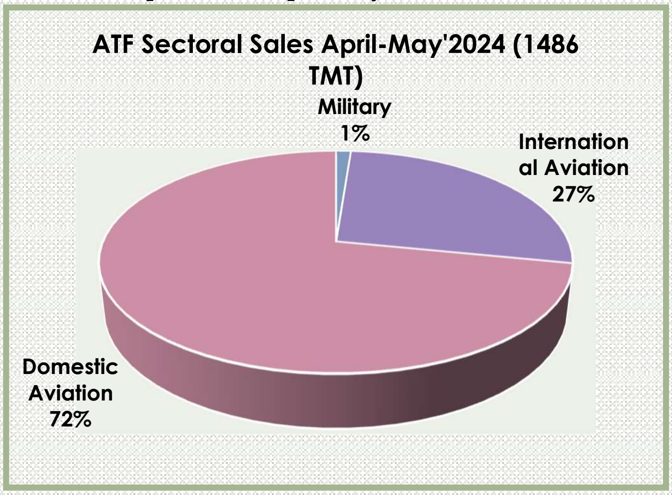
During 'April-May'25, total ATF domestic consumption with a volume of 1.55 MMT registered 4.1% growth Year-on Year basis over the volume of 1.49 MMT in 'April-May-24.

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





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

During the month of April 2025, all operational airports (taken together) handled 247.78 thousand aircraft movements (excluding General Aviation Movements), 35.72 million passengers and 315.12 thousand tonnes of freight.

The below table reveals that the aircraft movements, passengers and freight has increased by 6.1%, 10.3% and 11.5% respectively at all Indian airports during April,2025 over April, 2024.

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	April		% CHANGE
	2025-26	2024-25	
Aircraft Movements (in '000)			
International	39.84	35.99	10.7
Domestic	207.94	197.47	5.3
Total	247.78	233.46	6.1
General Aviation	28.23	23.65	19.4
Grand Total(INTL+DOM+Gen)	**276.01**	**257.11**	**7.4**

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								
April								
REGION	April		Change	REGION	April		Change	Difference
	2025-2026	2024-2025			2025-2026	2024-2025		
AIRCRAFT MOVEMENTS (IN NOS)				ATF CONSUMPTION (IN TMT)				
EASTERN	25824	23640	9.2%	EASTERN	50	54	8.7%	0.5%
NORTH EAST	8246	7931	4.0%	NORTH EAST	15	17	9.3%	-5.3%
NORTHERN	54143	53039	2.1%	NORTHERN	272	295	8.5%	-6.4%
SOUTHERN	65949	60270	9.4%	SOUTHERN	224	232	3.7%	5.7%
WESTERN	53773	52588	2.3%	WESTERN	197	204	3.3%	-1.0%
Total	**207935**	**197468**	**5.3%**	**Total**	**758**	**801**	**5.7%**	**-0.4%**

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 May 2025 with a volume of 0.510 MMT and de-growth of 17.4% over the volume of 0.617 MMT in May-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 .

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

- The sectors of Iron & steel sector showed degrowth during the month.
- The Shipping sector was the sector having the highest share.

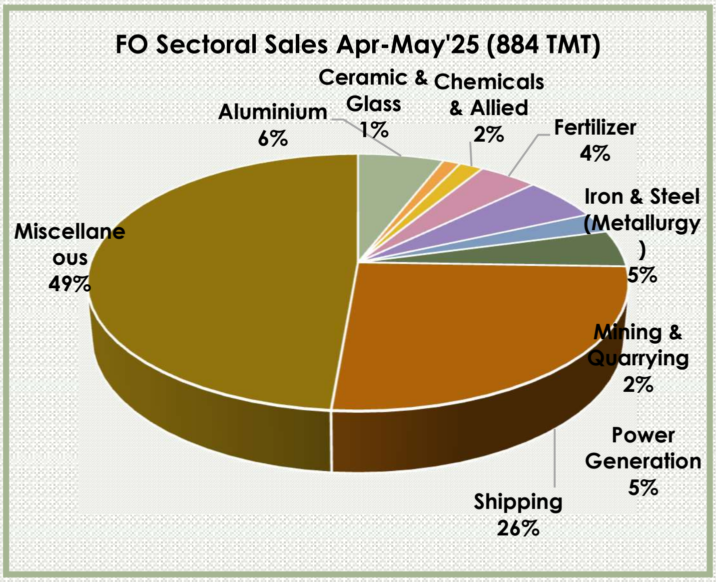
Sectoral consumption of FO/LSHS:

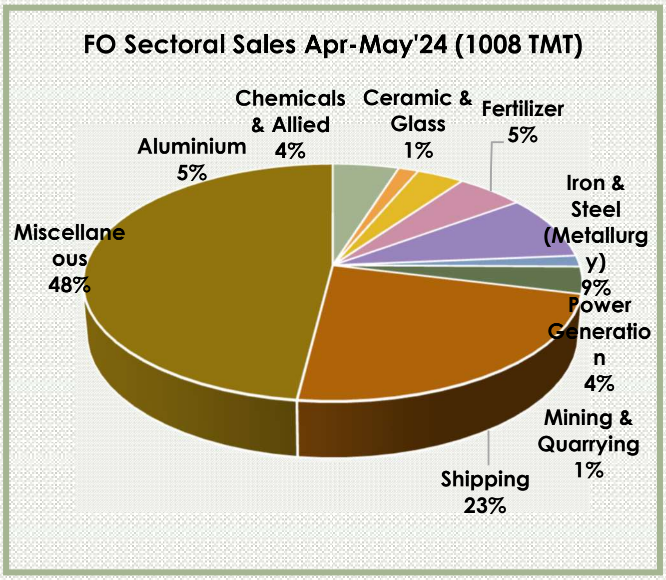
During 'April-May'25, total FO/LSHS consumption with a volume of 1.00 MMT with a de-growth of 12.4% Year-on Year basis over the volume of 1.14 MMT in 'April-May'24.

Further Product wise consumption for FO Apr-May '25 was 0.9 MMT vs 1.0 MMT in Apr-May'24 (12.3% de-growth). For LSHS, Apr-May'25 was 0.12 TMT vs 0.14 TMT in Apr–May'24 (14.2 % De-growth)

Details YoY comparisons are pictorially presented in the following figure.

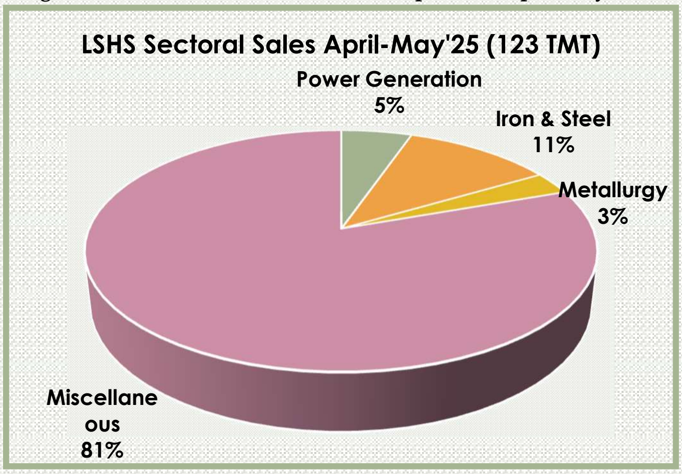
Figure-U: Sector wise FO+LSHS consumption of 'April-May'25 and its comparison to 'April-May'24

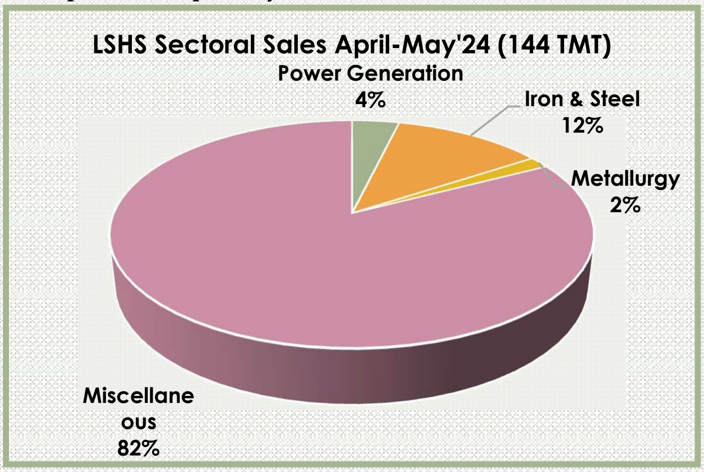




Apr-May'25:-	**Apr-May'24:-**
Shipping sector has a share of 26%, up from 23% from previous period, follow by Iron & steel, fertilizer and Aluminium.	Shipping contributes the highest share with 23% followed by Iron & Steel, Aluminiun Glass, Fertlizer & Power generation.

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





April-May'25:-	**April-May'24:-**
Iron & Steel sector contributed to be the largest sector followed with 11% by Power Generation 5%	Iron & steel contributes the highest share with 12% followed by Power generation & Metallurgy

Petcoke:

Petcoke consumption during the month of May 2025 with a volume of 1.83 MMT and growth of 6.4% over the volume of 1.72 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 and there is growth of 2 % in consumption of petcoke in this sector for May 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.

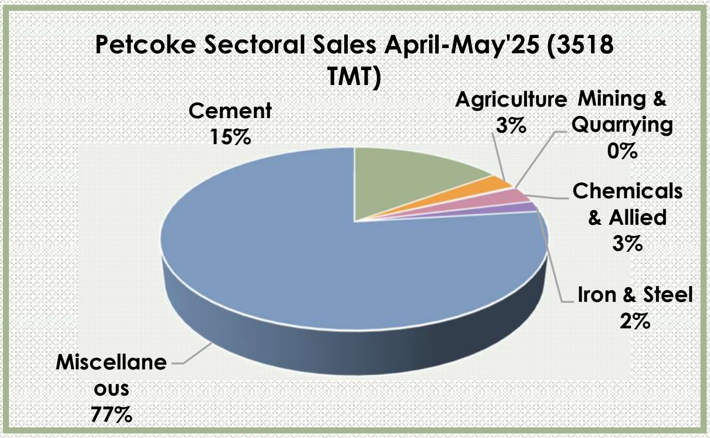
Sectoral consumption of Petcoke:

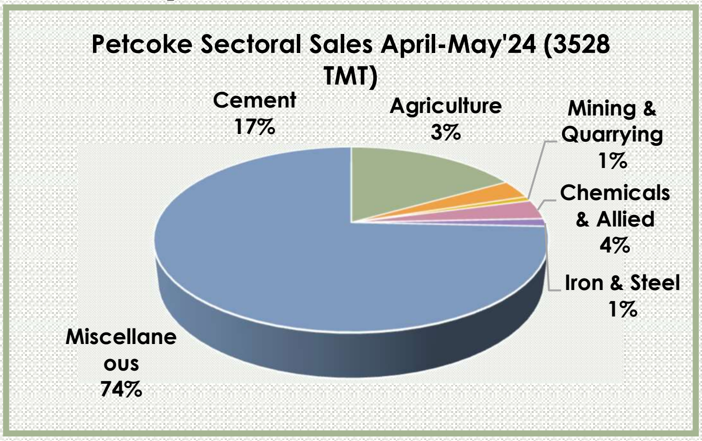
During 'April-May-25', total petcoke cummulative domestic consumption with a volume of 3.52 MMT registered 0.3% de-growth Year-on Year basis over the volume of 3.53 MMT in 'April-May-24'.

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

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

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





April-May'25:-	April-May'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 18%, followed by other sectors.

Light Diesel Oil

LDO consumption during the month May 2025 with a volume of 0.081 MMT registered a 30.0% growth over the volume of 0.062 MMT in May 2024.

May 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 .

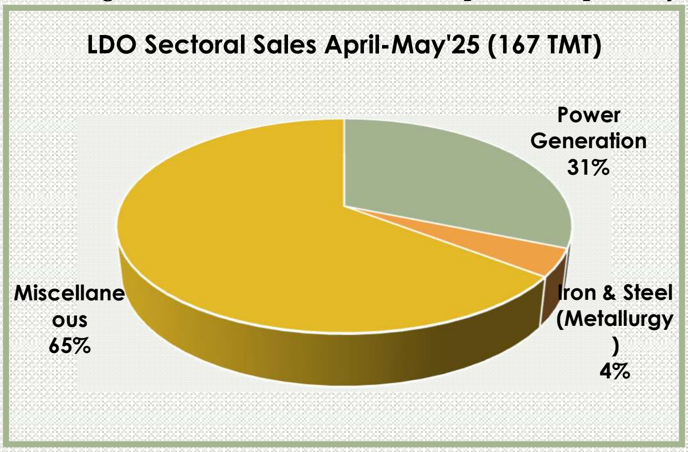
LDO consumption in the power sector is primarily associated with initial light-ups of the power plants.

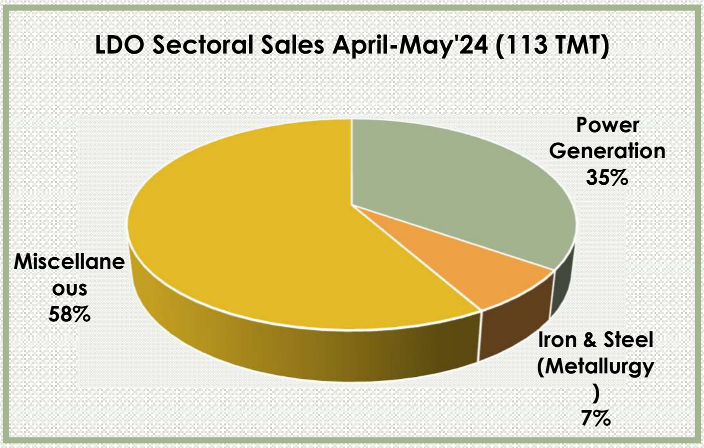
Sectoral consumption of Light Diesel Oil:

During 'April-May-25, total LDO domestic consumption with a volume of 0.17 MMT registered a 47.0% growth Year-on Year basis over the volume of 0.11 MMT in 'April-May-24.

The cumulative consumption of Light Diesel oil (LDO) during 'April-May'25' was driven by 'Power Generation' 31% followed by Iron & Steel at 4%. Detailed comparisons are pictorially presented in the following figure

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





April-May 25:-	**April-May24**:-
Power Generation occupied a 31% share for the product followed by Iron & Steel & Misc industries	Power Generation occupied a 35% 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.

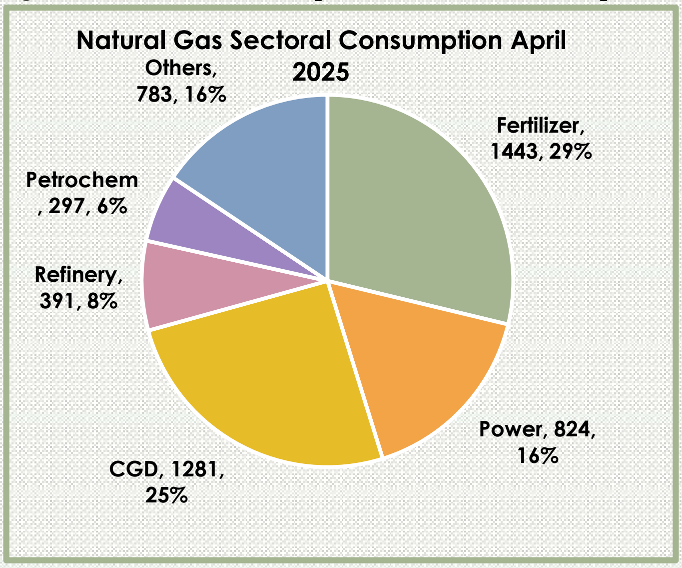
'Total Natural Gas Consumption (including internal consumption) for the month of May 2025 was 5918 MMSCM which was 10% lower than the corresponding month of the previous year. The cumulative consumption of 11764 MMSCM for the current financial year till May 2025 was lower by 1.8 % compared with the corresponding period of the previous year.

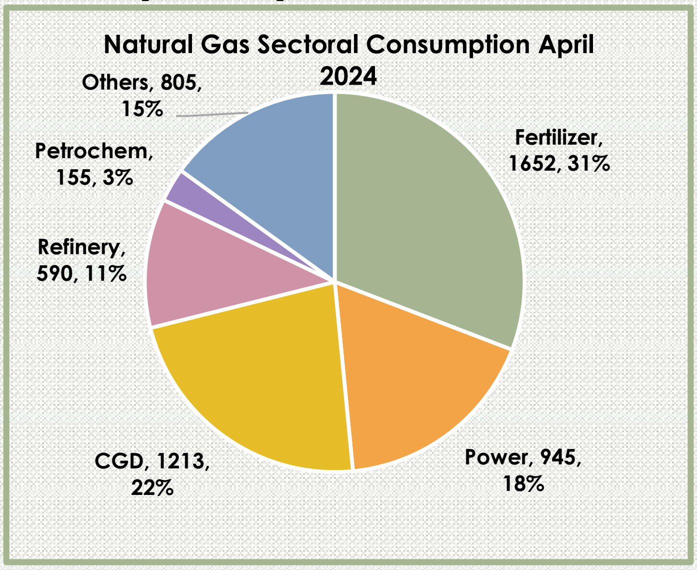
Sectoral consumption of Natural Gas consumption of 'April'25'& its comparison to 'April'24: (PROVISIONAL)

During April-25, total Natural Gas monthly domestic consumption with a volume of 5,019 MMSCM, over the volume of of 5,359 MMSCM during the same period in the preceeding year

During April'25, consumption of Natural gas (NG) was driven by fertilizer (29%) followed by CGD (25%), Power (16%) Refinery (8%), Petrochemicals (6%). Misc sectors occupied a share of 16% in April-2025.

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





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

P: provisional

April- 2025	*April- 2024*
Fertilizer sector occupied the highest share for the Consumption of Natural Gas at 29% 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

Product	April-May 2025-26			May								
	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	4783	5181	8.3	2156	2159	2347	2410	2660	23.3	23.2	13.3	10.4
SKO	57	64	13.5	136	68	42	30	39	-71.6	-42.9	-6.9	28.8
Sub Total	**4840**	**5245**	**8.4**	**2293**	**2226**	**2389**	**2440**	**2698**	**17.7**	**21.2**	**13.0**	**10.6**
(B) Major Decontrolled Product												
HSD	16337	16857	3.2	5532	7287	8217	8412	8593	55.3	17.9	4.6	2.2
MS	6747	7232	7.2	1991	3017	3350	3463	3782	90.0	25.4	12.9	9.2
Naphtha	2307	1930	-16.4	1171	828	1157	1090	998	-14.8	20.4	-13.8	-8.5
ATF	1486	1547	4.1	268	596	671	744	776	189.8	30.2	15.7	4.3
Bitumen	1775	1599	-9.9	653	734	864	940	803	22.9	9.4	-7.0	-14.5
FO & LSHS	1144	1002	-12.4	422	548	600	617	510	20.9	-7.0	-15.0	-17.4
Lubricants & Greases	846	697	-17.6	318	300	323	471	365	14.8	21.6	13.1	-22.4
LDO	113	167	47.0	77	55	69	62	81	5.7	48.3	17.2	30.0
Sub Total	**30756**	**31030**	**0.9**	**10432**	**13366**	**15250**	**15799**	**15908**	**52.5**	**19.0**	**4.3**	**0.7**
Sub - Total (A) + (B)	**35595**	**36275**	**1.9**	**12724**	**15593**	**17638**	**18238**	**18607**	**46.2**	**19.3**	**5.5**	**2.0**
(C) Other Minor Decontrolled Products												
Petroleum coke	3528	3518	-0.3	981	1472	1812	1723	1833	86.8	24.5	1.1	6.4
Others	2120	1692	-20.2	873	1305	1238	1119	878	0.6	-32.7	-29.0	-21.5
Sub Total	**5648**	**5210**	**-7.8**	**1854**	**2777**	**3050**	**2842**	**2711**	46.2	-2.4	-11.1	-4.6
Total	**41244**	**41485**	**0.6**	**14579**	**18370**	**20688**	**21080**	**21318**	**46.2**	**16.0**	**3.0**	**1.1**

Table title: Industry Consumption Trend Analysis 2024-25 (Provisional) ('000 MT)

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

Table-11

Product	April-May 2025-26			May								
	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	0.91	0.99	8.3%	0.81	0.81	0.88	0.90	1.00	23.3%	23.2%	13.3%	10.4%
SKO	0.01	0.0085	13.5%	0.04	0.02	0.01	0.01	0.01	-71.6%	-42.9%	-6.9%	28.8%
Sub Total	**0.9**	**1.0**	**8.4%**	**0.8**	**0.8**	**0.9**	**0.9**	**1.0**	**19.3%**	**21.8%**	**13.1%**	**10.5%**
(B) Major Decontrolled Product												
HSD	2.04	2.10	3.2%	1.36	1.79	2.02	2.06	2.11	55.3%	17.9%	4.6%	2.2%
MS	0.98	1.05	7.2%	0.57	0.86	0.96	0.99	1.08	90.0%	25.4%	12.9%	9.2%
Naphtha	0.33	0.28	-16.4%	0.33	0.23	0.33	0.31	0.28	-14.8%	20.4%	-13.8%	-8.5%
ATF	0.20	0.21	4.1%	0.07	0.16	0.18	0.19	0.20	189.8%	30.2%	15.7%	4.3%
Bitumen	0.18	0.16	-9.9%	0.13	0.14	0.17	0.18	0.16	22.9%	9.4%	-7.0%	-14.5%
FO & LSHS	0.13	0.11	-12.4%	0.09	0.12	0.13	0.13	0.11	20.9%	-7.0%	-15.0%	-17.4%
Lubricants & Greases	0.10	0.08	-17.6%	0.07	0.07	0.08	0.11	0.09	14.8%	21.6%	13.1%	-22.4%
LDO	0.01	0.02	47.0%	0.02	0.01	0.02	0.01	0.02	5.7%	48.3%	17.2%	30.0%
Sub Total	**4.0**	**4.0**	**1.1%**	**2.6**	**3.4**	**3.9**	**4.0**	**4.0**	**53.4%**	**19.5%**	**4.7%**	**1.2%**
Sub - Total (A) + (B)	**4.9**	**5.0**	**2.5%**	**3.5**	**4.2**	**4.8**	**4.9**	**5.1**	**45.1%**	**20.0%**	**6.2%**	**2.9%**
(C) Other Minor Decontrolled Products												
Petroleum coke	0.32	0.32	-0.3%	0.17	0.26	0.32	0.31	0.33	86.8%	24.5%	1.1%	6.4%
Others	0.28	0.22	-20.2%	0.23	0.34	0.32	0.29	0.23	0.6%	-32.7%	-29.0%	-21.5%
Sub Total	**0.6**	**0.5**	**-9.6%**	**0.4**	**0.6**	**0.6**	**0.6**	**0.6**	**38.1%**	**-7.8%**	**-13.9%**	**-7.2%**
Total	**5.5**	**5.54**	**1.2%**	**3.9**	**4.8**	**5.4**	**5.5**	**5.6**	**44.4%**	**16.5%**	**3.8%**	**1.8%**

Table title: Industry Consumption Trend Analysis 2024-25 (Provisional) ('Million Barrels per Day)

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

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