INDUSTRY CONSUMPTION REPORT-POL & NG, SEPTEMBER 2023

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वितरण 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-12013/02/2023-I 30.10.2023

No. D-12013/02/2023-I

विषय: पीपीएसी की उद्योग बिक्री समीक्षा रिपोर्ट – अगस्त 2022

Subject: Industry Consumption Review Report of PPAC: September 2023

पेट्रोलियम योजना एवं विश्लेषण प्रकोष्ठ (PPAC) द्वारा सितम्बर 2023 के महीने के लिए मासिक पेट्रोलियम उद्योग उपभोग की समीक्षा रिपोर्ट तैयार की गई है। रिपोर्ट में सितम्बर 2023 के महीने के दौरान पी.ओ.एल उत्पादों और प्राकृतिक गैस की खपत का विश्लेषण है। रिपोर्ट आपके सन्दर्भ के लिए सलंग्न है ।

यह रिपोर्ट दिनांक 26.10.2023 को पीपीएसी पोर्टल पर संशोधित अद्यतन खपत डेटा के आधार पर तैयार की गई है। यदि इस रिपोर्ट पर आपका कोई प्रश्न है, तो कृपया श्री ऋत्विक कुमार हातियाल को ritwik.hatial@ppac.gov.in पर लिखें।

The monthly Petroleum Industry Consumption Review Report has been prepared by the Petroleum Planning and Analysis Cell (PPAC) for the month of September-2023. The report contains analysis of consumption of POL products and natural gas during the month of September-2023. The same is enclosed for kind reference.

This report has been drafted beased on the updated consumption data on PPAC portal dated 26.10.2023.

If you have any question on this report, please write to Mr. Ritwik Kumar Hatial at ritwik.hatial@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:

Recent G-20 summit witnessed the world leaders to have an oath in tripling Global Renewable Energy Capacity by 2030 with respect to 2023. According to IEA as of now total Global Installed Renewable Energy capacity is 3400 GW.Expanding the renwable energy capacity in such space would have potential to reduce 7 billion tonnes of CO_2 emission between 2023 to 2030.

Hon'ble PNG minister flagged off two buses fueled by Green Hydrogen assigned a target to make the number 23 by end of 2030. According to survey the mileage of the busses (MCVto light HCV) is approx. 11.7Km per Kg Hydrogen.

The Union Cabinet approved the extension of Pradhan Mantri Ujjwala Yojana (PMUY) for release of 75 lakh LPG connections. A targeted subsidy of Rs. 100 over & above on Rs.200 per 14.2 kg LPG cylinder, earlier announced for upto 12 refills per year is being provided to PMUY consumers

The Central Government brought down the domestic LPG cylinder (14.2 Kg) price by ₹ 200 for all the LPG consumers.

₹1,62,712 crore gross GST revenue collected during September 2023; records 10% Year-on-Year growth. Monthly GST revenues more than ₹1.6 lakh crore crossed for the 4th time in FY2023-24. ₹9,92,508 crore gross GST collection for the first half of FY 2023-24 marks 11% Y-o-Y growth. Average monthly gross GST collection in FY 2023-24 at Rs. 1.65 lakh crore with 11% Y-o-Y growth.

The average FOB (Free on Board) price of Indian basket crude oil during the month September-2023 was USD 93.54/bbl.

The power demand in September 2023 registered 9.3% growth as compared to September 2022 and power deficit was reduced to 0.2% in the month of September 2023.

The average rainfall during the month was at 190 mm with 13% departures from Long Period Average (LPA). Traffic at major ports during the month of September 2023 recorded a YoY growth 0.3% of the volumes in the month of September 2022.

The growth percentage in consumption of petroleum products, category-wise, for the month of September 2023 is given in Table-1.

SUMMARY OF PRODUCT WISE POL CONSUMPTION PROFILE FOR SEPTEMBER-23

1. The consumption of petroleum products in September 2023 with a volume of 18.3 MMT registered 8.2% & 12.8% growth YoY basis over the volume of 16.9 MMT and 16.2 MMT in September 2022 & pre oandemic 2019 respectively.

2. MS (Petrol) consumption during the month of September 2023 with a volume of 3.1 MMT (0.91 mbpd) recorded a growth of 8.2% on the volume of 2.8 MMT (0.84 mbpd) in September 2022.

   The Sale of Passenger Vehicles in September-2023 with a volume of 3.17 lacs registered 3.1% growth over volume of 3.07 lacs during September-2022. Two-wheeler sales in September 2023 with a volume of 17.5 lacs registered 0.8%growth over volume of 17.4 lacs during September-2022. Three-wheeler domestic passenger vehicles touched a sales volume of 0.7 lac in September-2023 registering 47% YoY growth rate over a volume of 0.5 lac in September-2022.

3. HSD (Diesel) consumption during the month of September 2023 with a volume of 6.5 MMT (1.65 mbpd) recorded a growth of 3.8% on the volume of 6.3 MMT (1.59 mbpd) MMT in the month of September-22

4. LPG consumption during the month of September 2023 with a volume of 2.6 MMT registered 4.5% growth over the volume of 2.4 MMT in September-2022. As usual, LPG consumption during the month had been largely driven by consumption in packed domestic category (88%).

5. ATF consumption during September 2023 with a volume of 0.66 MMT registered a growth of 11%,

over a volume of 0.59 MMT during the month of September 2022.

6. Bitumen consumption during September 2023 with a volume of 0.55 MMT registered 50.9% growth over the volume of 0.36 MMT in the month of September 2022.

7. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 22.5% in September 2023 as compared to September 2022. SKO consumption during the month is largely constituted by PDS category 0.018MMT.

8. Average percentage of ethanol blending in petrol (EBP) marked 11.3% in August-2023. Around 45.7 cr litre ethanol has been blended in petrol under EBP program during August-2023.

9. Total Natural Gas Consumption (including internal consumption) for the month of September 2023, with a volume of 5.3 BCM, registered 11% growth over the volume of 4.7 BCM, in corresponding month of the previous year.

10. As on 1st October-23, number of LPG domestic connections marked at 3154.5 lakhs, PMUY connections registered 958.5 lakhs , LPG distriburtors in gramin kshetriya was 11,758 and LPG distriburtors in durgam kshatriya reported 2020 numbered.

This report analyses the trend of consumption of petroleum products in the country during the month of September 2023. Data on product-wise monthly consumption of petroleum products for September 2023 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.

Table-1: Petroleum Products Consumption (Quantity in TMT)

Product	September				April-September		
	2022	2023	% share of July-23	Growth (%)	2022-23	2023-24	Growth (%)
(A) Sensitive Products							
LPG	2441	2551	14	4.5	13774	14135	2.6
SKO	41	32	0.2	-22.5	281	257	-8.7
Sub Total	**2482**	**2583**	**14**	**4.07**	**14055**	**14392**	**2.4**
(B) Major Decontrolled Product							
HSD	6253	6493	36	3.8	41389	43989	6.3
MS	2827	3058	17	8.2	17424	18514	6.3
Naphtha	977	999	5	2.2	5966	6575	10.2
ATF	592	657	4	11.0	3503	3966	13.2
Bitumen	363	547	3	50.9	3245	4055	25.0
FO/LSHS	604	536	3	-11.4	3399	3304	-2.8
Lubes+Greases	266	324	2	21.9	1729	1976	14.3
LDO	62	63	0.3	1.2	353	397	12.6
Sub Total	**11944**	**12677**	**69**	**6.1**	**77008**	**82777**	**7.5**
(C) Other Minor Decontrolled Products							
Pet.Coke	1382	1518	8	9.9	8776	9724	10.8
Others*	1065	1485	8	39.5	7573	7401	-2.3
Sub Total	**2447**	**3004**	**16**	**22.8**	**16350**	**17125**	**4.7**
Total	**16872**	**18263**	**100**	**8.2**	**107413**	**114294**	**6.4**

**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 September'23, which may undergo change on receipt of actual data), and

(c) sales by SEZ units in Domestic Tariff Area (DTA)

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.

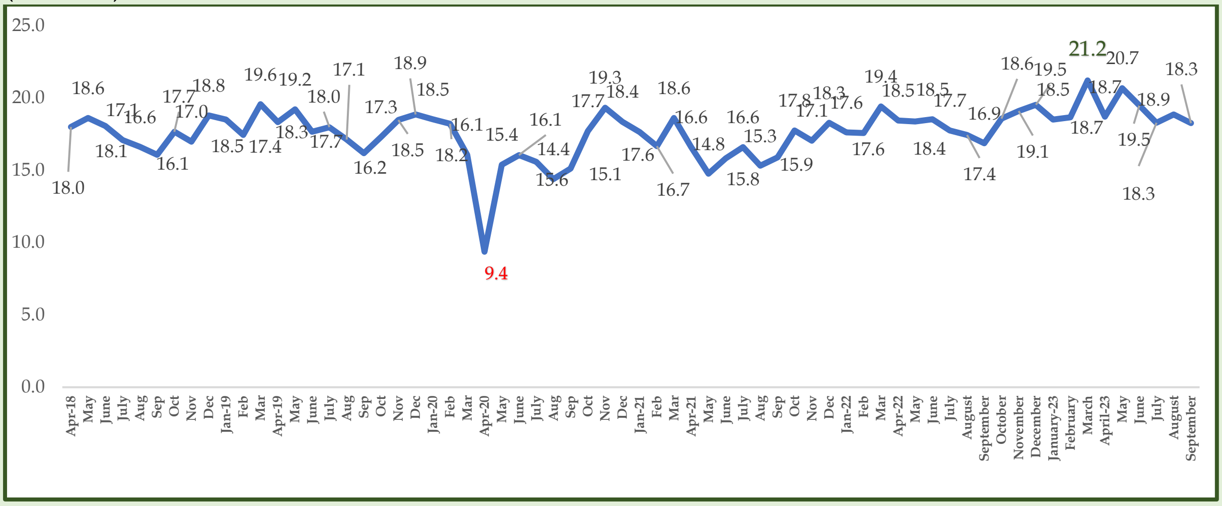
Overall consumption of all petroleum products in September 2023 with a volume of 18.3 MMT registered 8.2% growth over the volume of 16.9 MMT in September 2022. Growth was observed in LPG at 4.5%, Naphtha at 2.2%, MS 8.2%, ATF at 11%, HSD at 3.8%, LDO at 1.2%, Lubricants & Greases at 21.9%, Bitumen at 50.9%, Petroleum coke at 9.9% and products in 'Others' category at 39.5%

On cumulative basis, total POL consumption of 114 MMT during April-September-23 registered 6.4% growth YoY basis.

Moreover, product wise growth was obesered in LPG 2.6%, Naphtha 10.2%, MS 6.3%,ATF 13.2%, HSD7 6.3%, LDO 12.6% ,Lubricants & Greases 14.3%, Bitumen 25% and Petroleum coke at 10.8%.

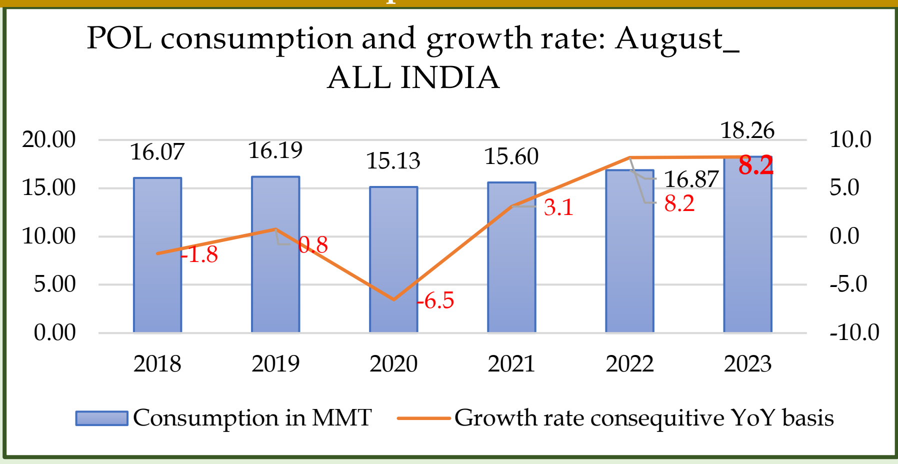
Pan India based domestic POL monthly consumption trend since September-2018 is shown in Figure-1.

Figure-1: **Monthly POL consumption (MMT) since September 2018 (max March-23 (21.2MMT) min April-20 (9.4 MMT)**



The overall POL domestic consumption profile of the month September & its pattern since 2018 with corresponding consequitive YoY growth rates were shwon in the Chart-1; it is found that September-23 consumption was quite promisiong and it is better that pre-covid era also, as shown in the chart.

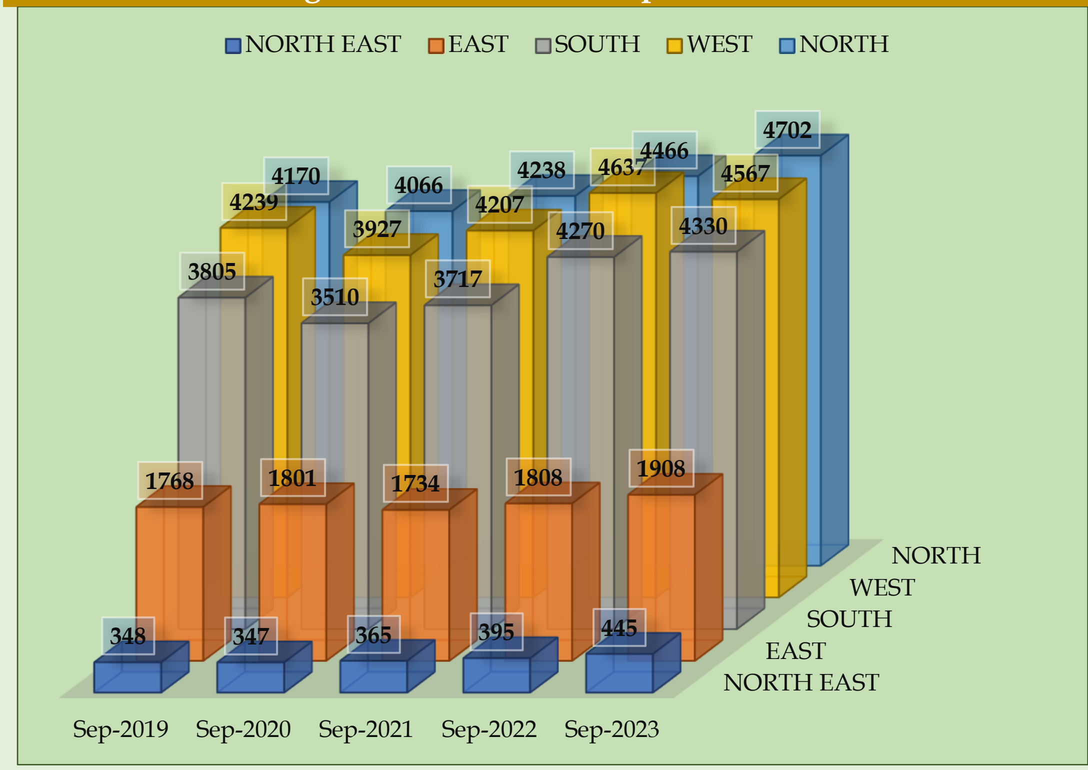
Chart-1: POL consumption & Growth rate YoY basis



So far as zone wise POL consumption is concerned, highest growth rate YoY basis observed in EASTERN zone 11.8% followed by West 4.1%,South 4.02%, North-East 3.99% and North 1.8%

Top three districts with respect to over all domestic POL sales were Jamnagar (452TMT), Baruch (327TMT) and Bangalore Urban (289 TMT). The following chart-1A shows Zone wise POL September-consumption trend for last FIVE years.

Chart-1A: Region wise 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 September 2023 with a volume of 3.1 MMT registered a growth of 8.2% and 28.9% over the volume of 2.8MMT & 2.4MMT in September 2022 & pre-pandemic 2019 respectively.

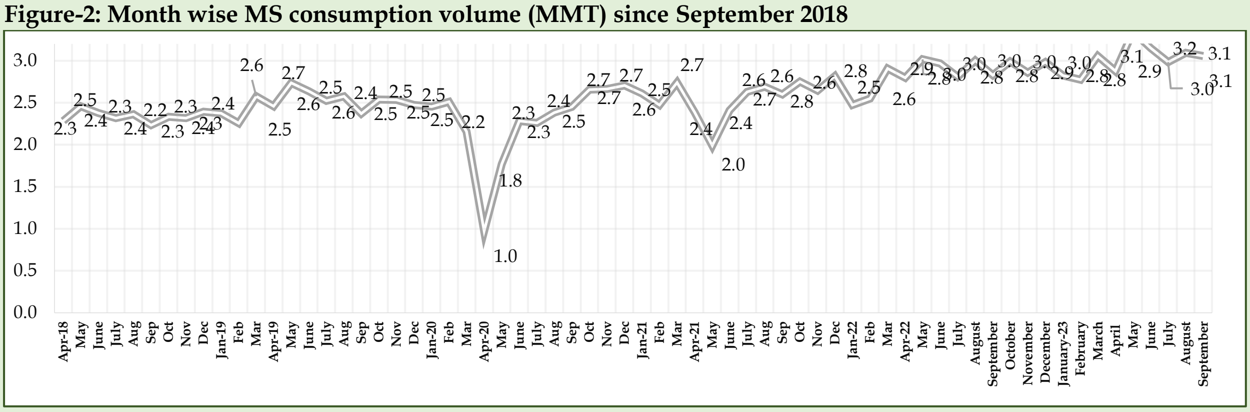
Major factors contributing to MS consumption during the month are as follows:

- Economic momentum was well maintained at accelerated space during the month as shown in economic factors like e-way bill, GST collection, PMI index etc.
- Tourism dependent states saw a heavy influx of travelers giving a boost to economic activities;
- In few states MS consumption was affected by excessive rainfall, floods etc.

  However, recovery of retail MS consumption was very fast post flood period. Recovery and aiding programs to the affected areas increased mobility causing more MS consumption
- Advanced winter upliftment by Indian Army increased MS consumption

Pan India based domestic MS monthly consumption trend since September-2018 is shown in Figure-2

Figure-2: Month wise MS consumption volume (MMT) since September 2018



FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

The Sale of Passenger Cars in September 2023 at 3.17 lacs registered 3.1% growth YoY basis over sale of 3.07 lacs in the month of September 2022.

Utility vehicles recorded a growth of 27.7% during the current month as compared to the same period previous year. Vans recovered 86.4% YoY basis with respect to September-22, *as shown in the following Table-2.*

Table-2: Passenger cars & Utility vehicles sales in the month of September 2023 (Primary sales data)

Vehicle Segment	September		
	2022	2023	Growth %age
Passenger Cars	1,42,727	1,11,889	-21.6
Utility Vehicles	1,51,759	1,93,872	27.7
Vans	12,903	11,147	-13.6
Total PV	3,07,389	3,16,908	3.1

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

TWO-WHEELER SALES:

Two-wheeler sales in September 2023 with a volume of 15.5 lacs registered 0.8% growth, YoY basis over volume of 17.4 lacs during September 2022, ***as shown in the following table-3.***

THREE-WHEELER SALES

Three-wheeler domestic sales in September 2023 with a volume of 0.74 lac recorded a growth of 47%, YoY basis over the volume of 0.51 lac in September-2022, ***as shown in the following table-3.***

Table-3: Two & Three Wheelers vehicle sales in the month of September 2023 & YoY comparison (Primary sales data)

Vehicle Segment	September		
	2022	2023	**Growth %age**
Scooters/Scotrette	5,72,919	5,89,087	2.8
Motor Cycles/Step-Throughs	11,14,667	11,15,764	0.1
Mopeds	47,613	44,943	-5.6
Total Two Wheelers	17,35,199	17,49,794	0.8
Passenger Carrier-3 wheeler	39,363	59,501	51.2
Goods Carrier-3 wheeler	7,977	10,093	26.5
E-Rickshaw	2,950	4,569	54.9
E-cart	336	255	-24.1
Total Three Wheelers	50,626	74,418	47.0

Source: SIAM

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of September 2023 with a volume 6.5 MMT recorded a growth of 3.8% & 11.2% over a volume of 6.3MMT & 5.8MMT in the month of September 2022 & 2019 respectively.

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

- The delayed sowing season of Rabi crop in some parts of the country ramped up diesel consumption for in various agricultural activities.
- Full-fledged industrial and mining activities in various parts of India increased diesel consumption.
- Hot weather contributed to consumption for DG sets.
- However, in few states HSD consumption was affected by incessant rainfall, floods etc.
  Extended sawan season and no marriage dates in September-23 afftected HSD consumption.

The IHS Markit India Services PMI (Purchasing Managers' Index) for September-23 marked at 61.0 against the forecasted value of 59.5

Pan India based domestic HSD monthly consumption since April-18 is shown in the Fig-3. HSD market share in direct and retail sales is shown in the Fig-4.

Figure-3: Month-wise HSD consumption (MMT) since September 2018

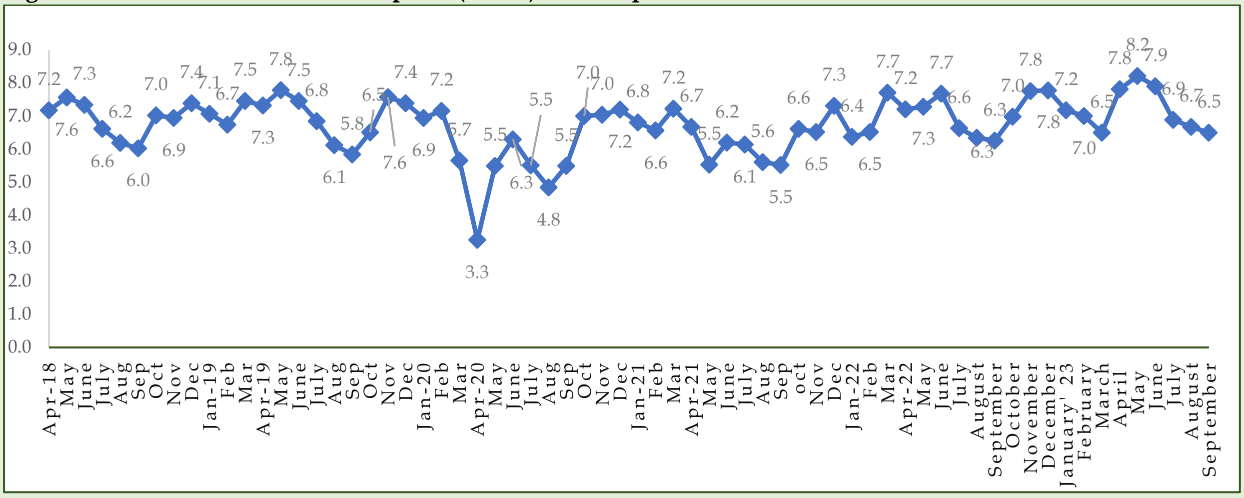
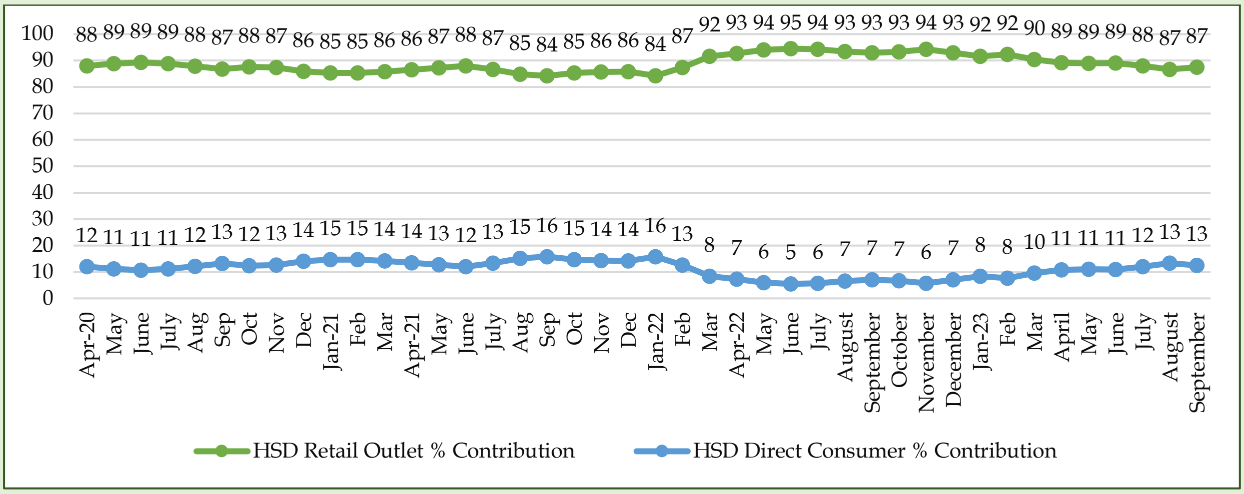


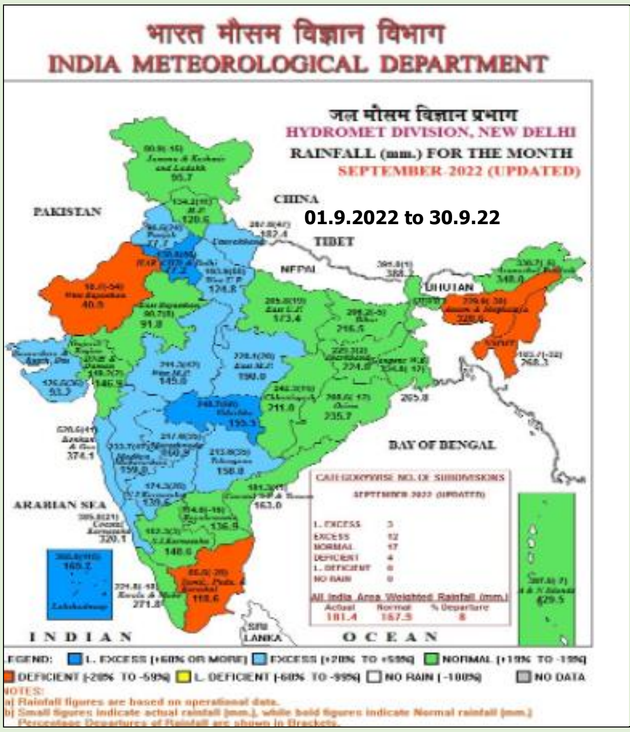
Figure-4: **Share of Retail & Direct business (%) in Diesel consumption month-wise since April 2020**

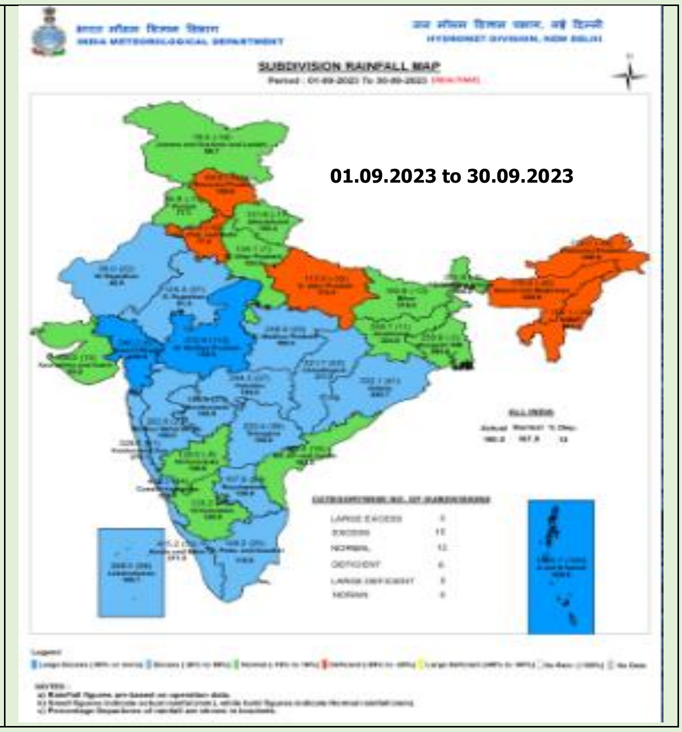


FACTORS IMPACTING CONSUMPTION OF HSD:

Seasonal rainfall scenario: The rainfall in the country during September 2023 was 13% higher than normal precipitation. A rainfall of 190 mm was recorded in the month of September 2023 as against a normal reading of 167.9 mm. Out of total 36 subdivisions, 18 division received excess to large excess rainfall, 6 divisions received deficient rainfall whereas 12 division received normal rainfall.

Source: India Meteorological Department (IMD)





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.

The number of e-way bill generation has increased to 9.2 crores in September-23 from 9.34 crores in August-23; one of the highest values so far.

COMMERCIAL VEHICLE

Based on data from FADA Research, Indian domestic sales of commercial vehicles registered 4.9% growth as compared to September 2022 as shown in Table-4.

TRACTOR SALE:

Tractor domestic sales in September 2023 with a volume of 54,492 recovered 90.3%over the volume of 60,321 lacs in September 2022.

However, in August-23 tractor sales registered 13.6% Y-o-Y growth. The subdued tractor sales in Sept-23 was the effected by the previous month growth.

Table-4: Domestic commercial vehicles & tractors sales with YoY comparison (Secondary sales data)

Commercial vehicles & tractors		September		
		2022	2023	Growth % age
CV	LCV	47043	46213	-1.8
	MCV	5185	5623	8.4
	HCV	22713	25237	11.1
	Others	2113	3731	76.6
Total CVs		77054	80804	4.9
Tractors		60321	54492	-9.7

Source: FADA research

"Disclaimer:

1- Vehicle Retail Data has been collated as on 02.05.23 in collaboration with Ministry of Road Transport & Highways

2- Commercia Vehicle is subdivided in the following manner

a. LCV – Light Commercial Vehicle (incl. Passenger & Goods Vehicle)

b. MCV – Medium Commercial Vehicle (incl. Passenger & Goods Vehicle)

c. HCV – Heavy Commercial Vehicle (incl. Passenger & Goods Vehicle)

d. Others – Construction Equipment Vehicles and others

PORT TRAFFIC:

The cargo traffic handled at major ports in India with a volume of 61.9 MMT in September 2023 recorded a growth of 0.3% on YoY basis over the volume of 61.7 MMT in September-22.

Growth was observed in cargo handled during the month of September 2023 in all the major ports like Paradip 11.1%,Visakhapatnam at 3.9%, Kamarajar (Ennore) at 21.9%, Chennai at 5.4%, V.O. Chidambaranar at 11.7%, Cochin at 7.4%, New Mangalore at 1.2%, Mormugao at 3.1% and JNPT at 7.3% with respect to September-2022.

During 'April-September-FY2023-24', sector wise growth was registered in 'coking & others' coal 6.1%, Finished & Raw Fertilizers 15.8%, Iron ore 34.1% and POL including crude 1.8% with respect to 'April-September-FY2022-23'.

The Percentage tonnage share in September-23 was maximum in CPOL 34.6% followed by container-tonnage & TEUs 25.6%, Coal (thermal, steam and coking) 23.4%, Iron ore 6.6% & other miscellaneous cargo 9.7% and fertilizer (finished & dry) 1.7%.

Growth pattern of cargo operation in percentage in all Indian ports and September-23 port wise cargo handled in MMT are depicted in the following Figure-5 and Table-5 respectively.

Figure-5: Growth percentage of cargo operation at major ports since September 2020

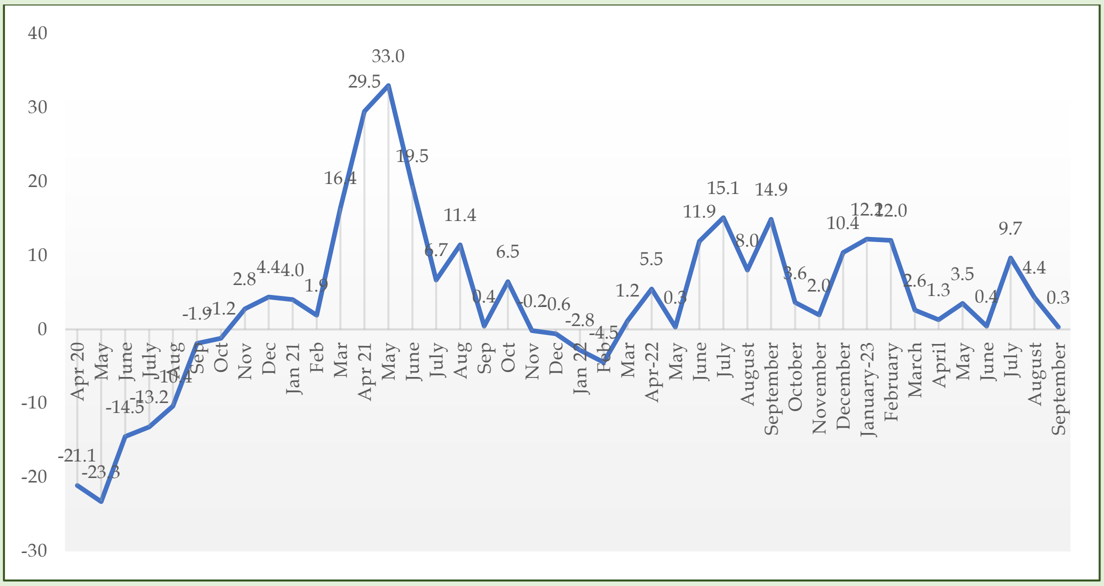


Table-5: Cargo handled at major ports in September 2023(Qty in TMT)

Ports	September 2022	September 2023	Growth (%)
Kolkata & Haldia	5,305	4,819	-9.2
Paradip	9,349	10,389	11.1
Visakhapatnam	6,227	6,470	3.9
Kamarajar (Ennore)	2,814	3,429	21.9
Chennai	4,153	4,377	5.4
V.O. Chidambaranar	3,074	3,435	11.7

Cochin	2,573	2,764	7.4
New Mangalore	2,758	2,791	1.2
Mormugao	1,178	1,215	3.1
Mumbai	5,548	5,467	-1.5
JNPT	6,465	6,938	7.3
Deendayal	12,273	9,809	-20.1
Total:	61,717	61,903	0.3

Source: ipa.nic.in

Power situation:

The position of power supply for the month of September 2023 is given in Table-6. As per the data reported, power deficit percentage was 0.4 in September-2023 whereas it was 0.2% in September-2022. The requirement of power in September 2023 was 1,39,105 MU and has recorded a growth of 9.3% over requirement of power at 1,27,226 MU in the month of September 2022.

Table-6: Region wise Power supplied vs requirement for September 2023

	September-2022			September-2023		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	43,424	43,213	-0.5%	46,973	46,731	-0.5%
West	35,778	35,776	0.0%	39,735	39,640	-0.2%
South	29,553	29,551	0.0%	33,326	33,319	0.0%
East	16,629	16,533	-0.6%	17,074	16,963	-0.7%
North-East	1,841	1,840	0.0%	1,997	1,954	-2.1%
Total	1,27,226	1,26,914	-0.2%	1,39,105	1,38,608	-0.4%

Source: Central Electricity Authority (CEA)

Sectoral consumption of HSD:

During 'April-September-FY2023-24', HSD total consumption with a volume of 44 MMT registered 6.3%growth Year-on Year basis over the volume of 41 MMT in 'April-September-FY2022-23'.

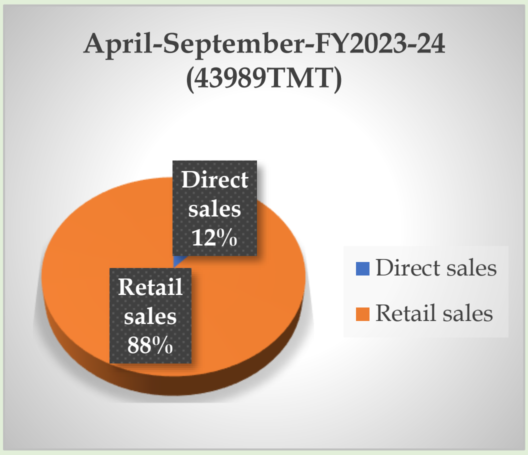
88% of cumulative HSD consumption during 'April-September-FY2023-24', was constituted by retail sales. Balance 12% falls under direct sales category as shown in 5A/B chart. Whereas the bifurcation was 94:6 in 'April-September-FY2022-23'.

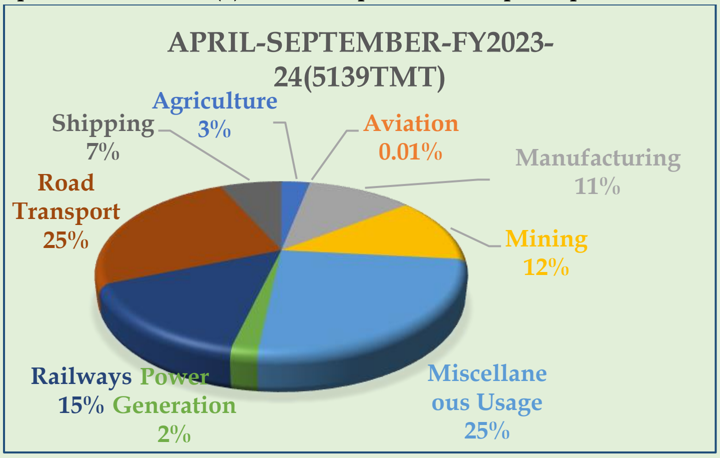
In direct sales category, the sectoral consumption break up is shown in 5B chart; i.e., for April-September-FY2023-24 'Road Transport' 25% followed by 'Miscellaneous usage' share was 25% Railways share was 15%, Mining 12%, Manufacturing 11%, Shipping 7%, Agriculture 3% and Power Generation 2%. Most of the retail sales are consumed in road transport.

Sectoral consumption in Railways in April-September-23 decreased by 21 percentage points & 23 percentage points respectively compared to same period of FY2022-23 and FY2013-24 due to electrification of railway-tracks. HSD consumption in railway sector has been reduced at a decadal CAGR of 5.2%.

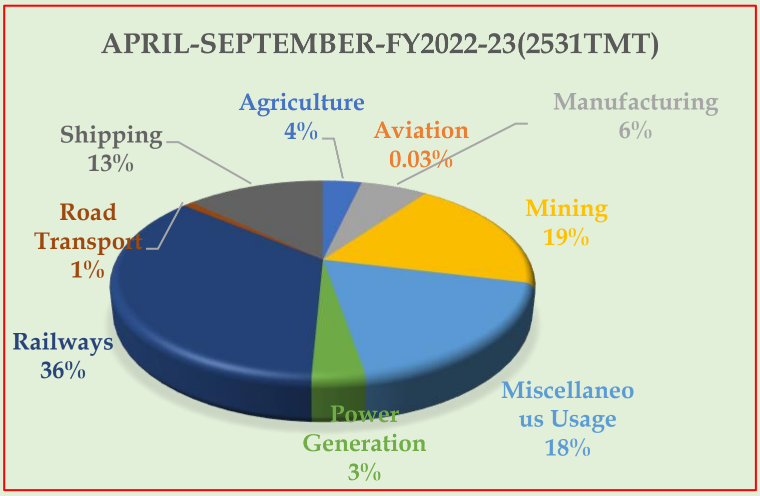
Further, in shipping sector HSD consumption in during H1FY2023-24 showed 6 percentage points less where as Road Transport is increased by 24 percentage points YoY basis. Details comparisons are pictorially presented in the following charts.

Chart-5A/B: **Sector-wise HSD consumption in April-September FY-2023-24 (P) and its comparison with April-September-FY2022-23 (P)**





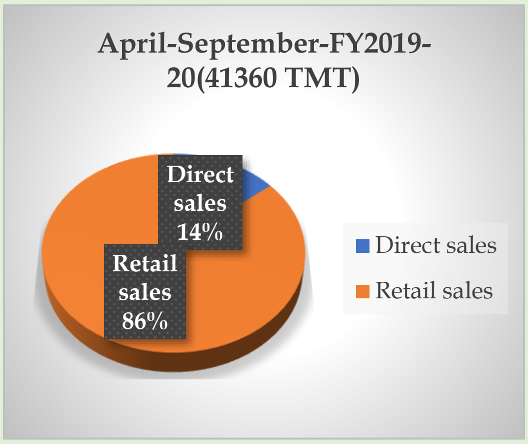
*Miscellaneous Usage (25%) includes 'Bulk applications' (24.95%), Universities (0.02%), Catering & hotels (0.04%), Posts & telegraphs (0.002%), State electricity boards (0.02%).
** Manifacturing (11%) includes chemicals (0.08%), Civil engineering (7.61%), 'Electricals/electronics' (0.09%), Mechanical/Metallurgy (1.84%), Bulk use(0.91%) and 'Textiles' (0.06%)

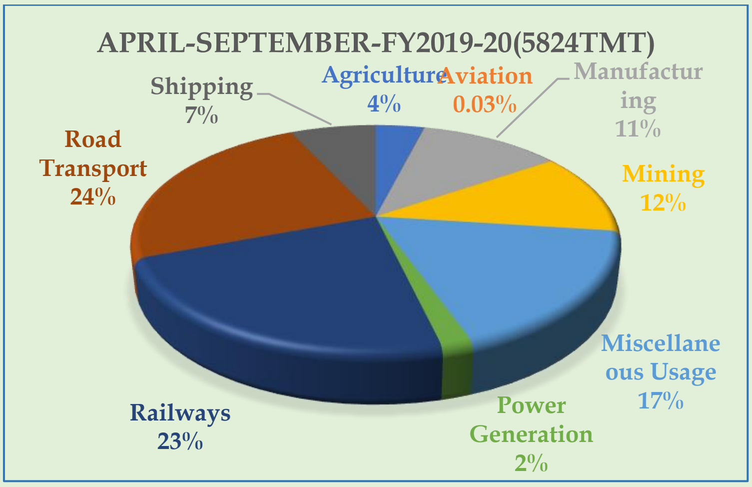


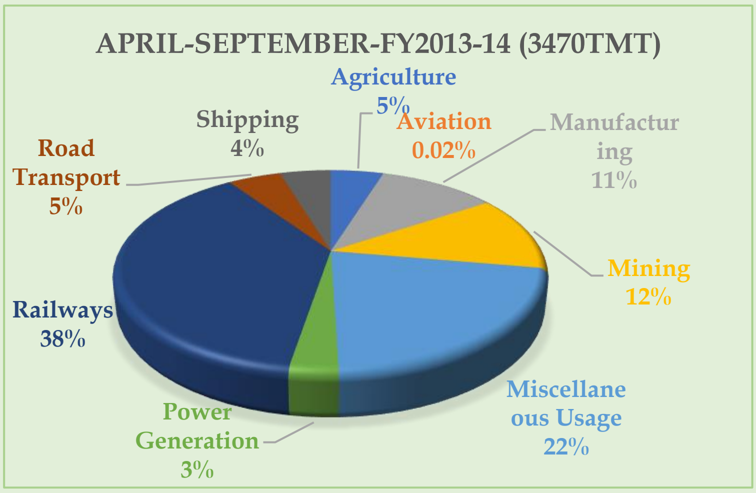
*Miscellaneous Usage (18.48%) includes 'Bulk applications' (18.31%), Universities (0.04%), Catering & hotels (0.06%), Posts & telegraphs (0.004%), State electricity boards (0.06%).

** Manifacturing (6.2%) includes chemicals (1.3%), Civil engineering (1.7%), 'Electricals/electronics' (0.2%), Mechanical/Metallurgy (2.6%), Bulk use(0.3%) and 'Textiles' (0.1%)

During FY2022-23, it was observed that HSD direct sales volume was shifted towards retail segment. Therefore, for better comparison we have made the direct sales volume bifurcation during April-September for FY2018-19 (pre-covid era) and FY2013-14, to get the decadal paradigm change over.







KEROSENE:

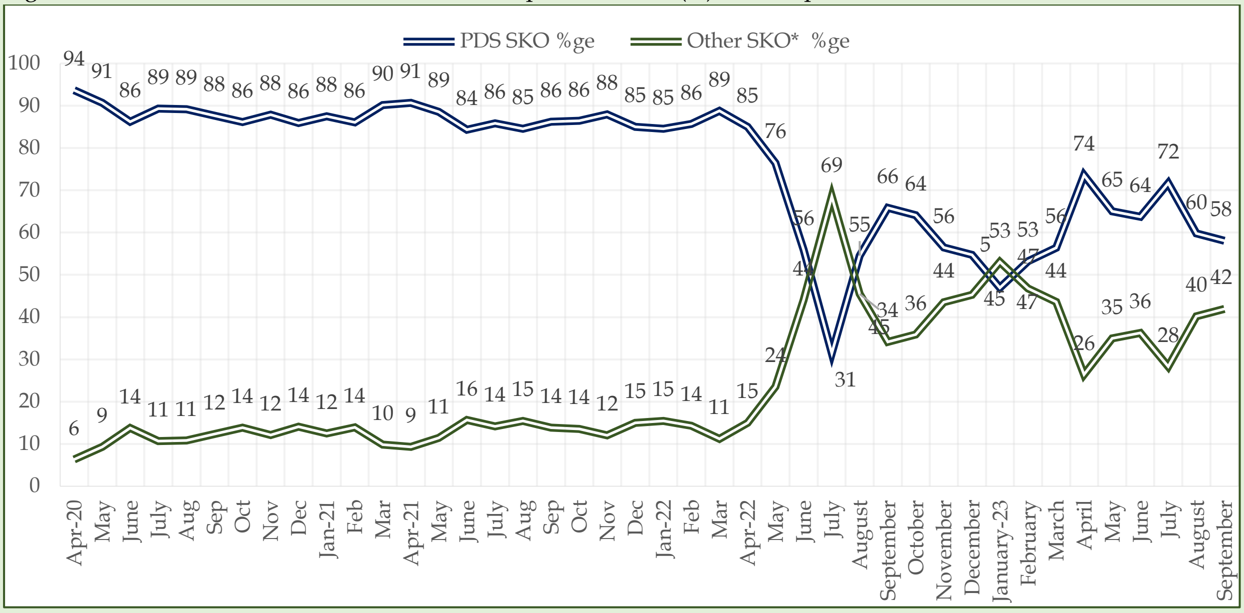
Kerosene consumption during September-2023 with a volume ***0.032 MMT registered de-growth of 22.5% & 82% over the volume of 0.041 MMT & 0.176 MMT in September-2022 & pre-Pandemic September- 19 respectively.***

Nil non-subsidized PDSSKO sales have been registered during the month.

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.

The market share of subsidized-PDS and other SKO was 58% & 42% respectively for the month September-23 as shown in the following figure.

Figure-6: M onth-wise PDS & other-SKO consumption in share (%) since September 2020



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

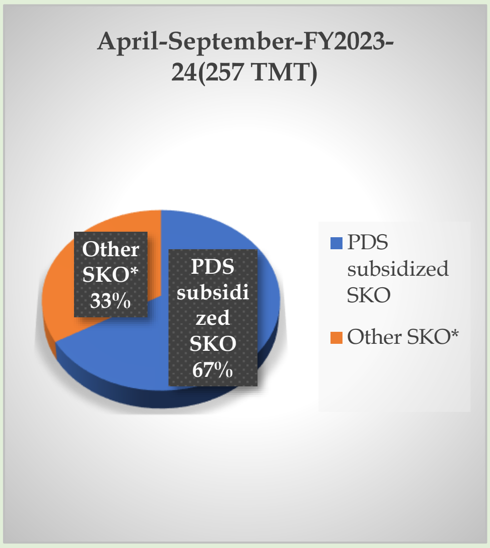
Sectoral consumption of SKO:

During 'April-September-FY2023-24', SKO total consumption with a volume of 0.257 MMT registered 8.7% degrowth Year-on Year basis over the volume of 0.281 MMT in 'April-September-FY2022-23'.

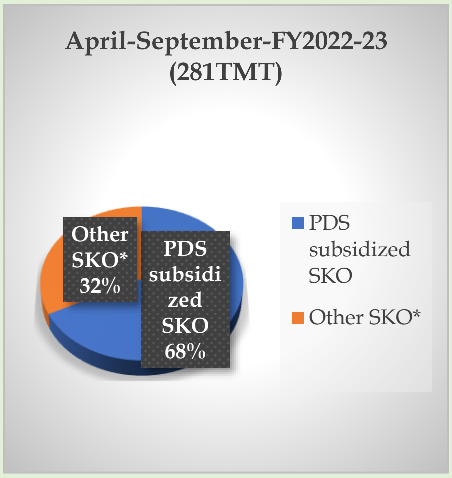
Out of total SKO sales during 'April-September-FY2023-24' 'PDS subsidized SKO' upliftment constituted to 67%. So far as sales in 'Other SKO' is concerned,' 47% accounted to Industrial applications followed by Military 27%, manufacturing 11%, agriculture & fisheries 11%.

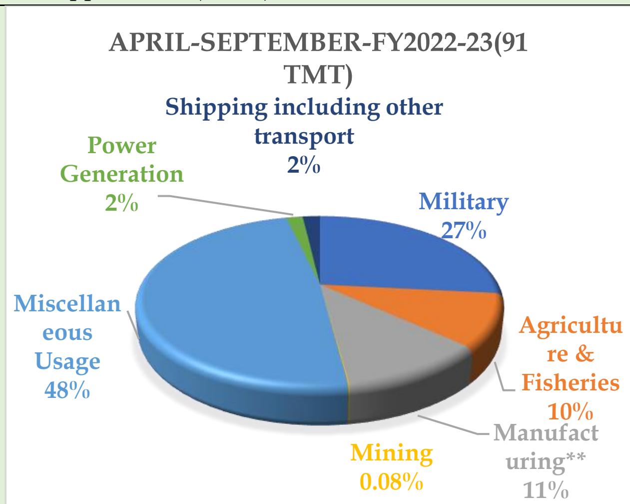
Detailed Y-o-Y comparisons are pictorially presented in the next page of chart-3.

Chart-3:PDS domestic, non-PDS commercial SKO sales & their breakup of 'April-September FY-2023-24' (P) and its comparison with 'April-September-FY2022-23' (P)



Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
**Manufacturing (11%) includes 'Chemicals' (3.02%), 'Civil engineering' (3.08%), 'Electrical/electronics' (0.01%), Mechanical/ Metallurgy (1.9%) , 'Bulk applications'(3.01%) and Textiles 0.05%.





Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
**Manufacturing (10.6%) includes 'Chemicals' (3.3%), 'Civil engineering' (4.1%), 'Electrical/electronics' (0.1%), 'Mechanical/ Metallurgy (1.8%) , 'Bulk applications'(1.4%) and Textiles NIL

BITUMEN:

Bitumen consumption during September 2023 with a volume of 0.547 MMT registered 50.9% & 70.7% growth over a volume of 0.363 MMT & 0.415MMT in the month of September 2022 and Pre-Pandemic September-2022;

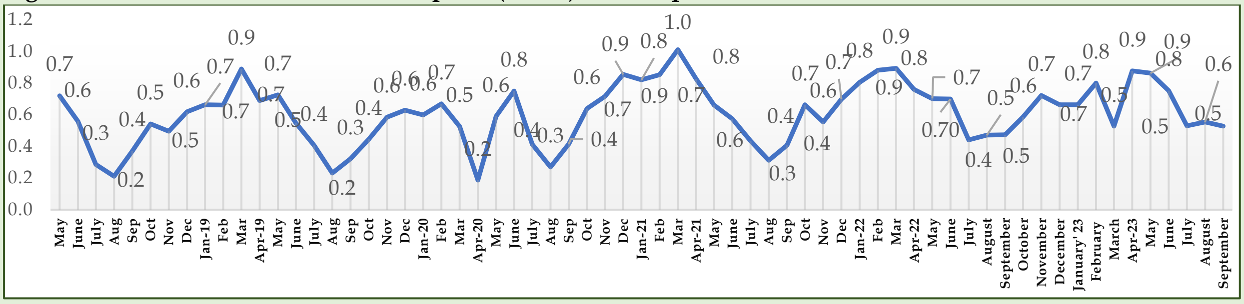
Major factors contributing to Bitumen consumption during the month are as follows:

- Road construction activity was run at a faster rate at the middle of second quarter
- Appreciable amount of Packed Bitumen demand from Border Roads Organizations(BRO) was observed for J&K and Ladakh area.

- Low base of last year also led to higher growth rate
- However, in few states road construction activity was affcetd by heavy rainfall

Pan India based domestic Bitumen monthly consumption since April-18 is shown in the Fig-7.

Figure-7: Month-wise Bitumen consumption (MMT) since September 2018



Sectoral consumption of Bitumen:

During 'April-September-FY2023-24', total bitumen consumption with a volume of 4.055 MMT registered 25% growth Year-on Year basis over the volume of 3.245 MMT in 'April-September-FY2022-23'.

98% of cumulative bitumen sales during 'April-September-FY2023-24', was constituted to Road construction, balance 2% was consumed by miscellaneous industries.

LPG:

LPG consumption during the month of September 2023 with a volume of 2.55 MMT registered 4.5% & 17.9% growth over the volume of 2.44 MMT & 2.16 MMT in September-2022 and prepandemaic September-2019 respectively.

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.

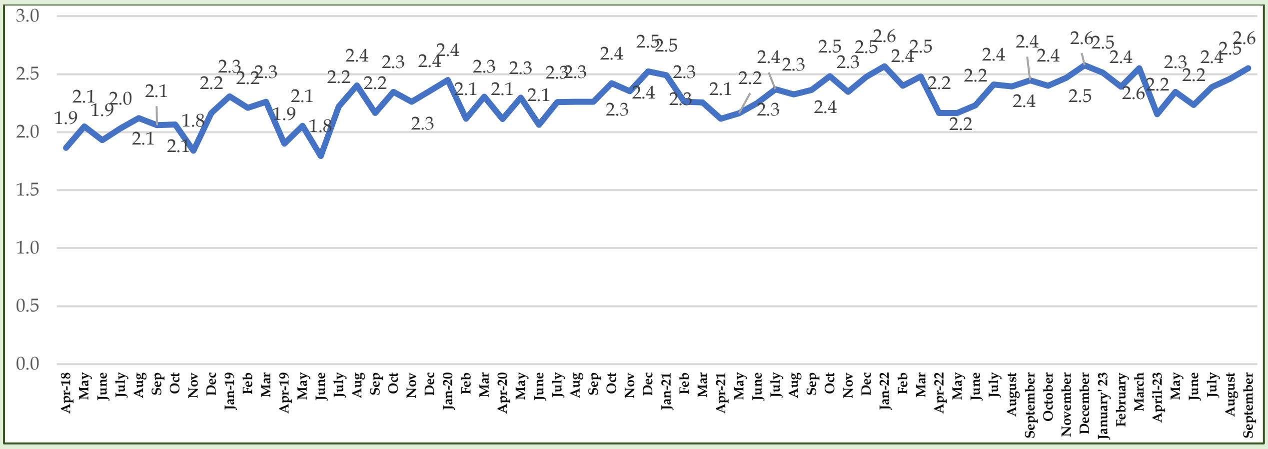
The subsidized prices in domestic LPG and price cut in commercial LPG category contributed to growth rate in LPG consumption.

Moreover, LPG consumption might be affected by domestic PNG penetration. CGDs are coming up facilatating domestic PNG network (D-PNG) strongly in recent time.

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

- Foam industries who were earlier using imported Propane and Butane have shifted to indegeneous LPG because of favorable pricing and *Antmanirvar Bharat* centiment.
- States like Rajasthan (92.7), Punjab (44%) and UK(36.9%) have shown very good growth in Auto LPG sector.
- ***Pan India based domestic LPG monthly consumption since April-18 is shown in the Fig-8.***

Figure-8: Month-wise LPG consumption (MMT) since September 2018

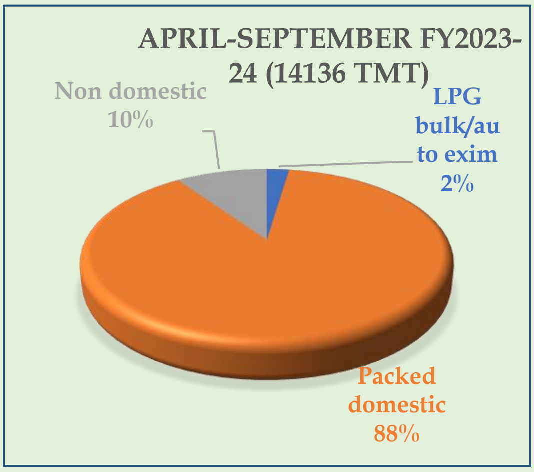


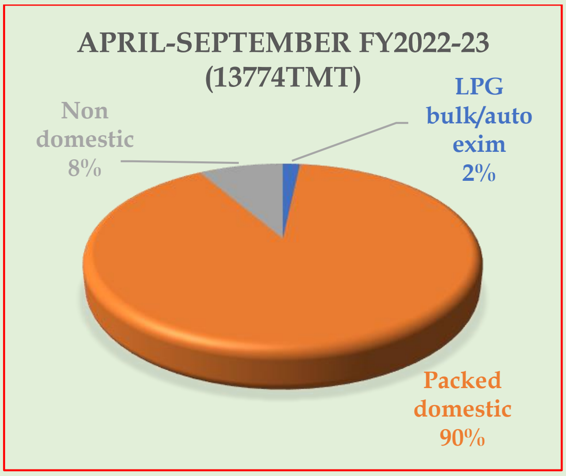
Sectoral consumption of LPG:

During 'April-September-FY2023-24', total LPG domestic consumption with a volume of 14.14 MMT registered 2.6% growth Year-on Year basis over the volume of 13.77MMT in 'April-September-FY2022-23'.

The Sectoral LPG consumption during 'April-September-FY2023-24', was driven by packed domestic category 88%, followed by 'non-domestic/industry/commercial sector 10% & 'LPG Bulk, Auto & Exim '2%. With respect to 'April-September-FY2022-23', sectoral LPG consumption profile in commercial LPG category during'April-September-FY2023-24' increased by 2 percentage points.

Chart-4: Sector wise LPG consumption of April-September-FY2023-24 (P) and its comparison with 'April-September-FY2022-23 (P)'





NAPHTHA:

Naphtha consumption during the month of September 2023 with a volume of 0.999 MMT registered 2.2% growth over the volume of 0.977 MMT in September-2022; however it recovered 90.6% over the volume of 1.102 MMT in prepandemaic September-2019.

Petrochemical industries remain the main consumers of naphtha.

Based on the market survey, Naphtha consumption during the month may be attributed due to the following reasons:-

- Some of the consumers increased their inventory of naphtha due to anticipated supply disruption for scheduled shut down of some of the refineries during the month.
- Some petrochemical companies increased naphtha consumption to optimize the feed based on the NG pricing

Sectoral consumption of Naphtha:

During 'April-September-FY2023-24', total Naphtha domestic consumption with a volume of 6.575 MMT registered 10.2% growth Year-on Year basis over the volume of 5.966 MMT in 'April-September-FY2022-23'.

Consumption of naphtha during 'April-September-FY2023-24' was driven by petrochemicals sector 79%, whereas 21% naphtha consumption fell in 'miscellaneous industries including power'.

On YoY basis, sectoral naphtha consumption in petrochemicals sector decreased by 12 percentage points. Detailed comparisons are pictorially presented in the following charts.

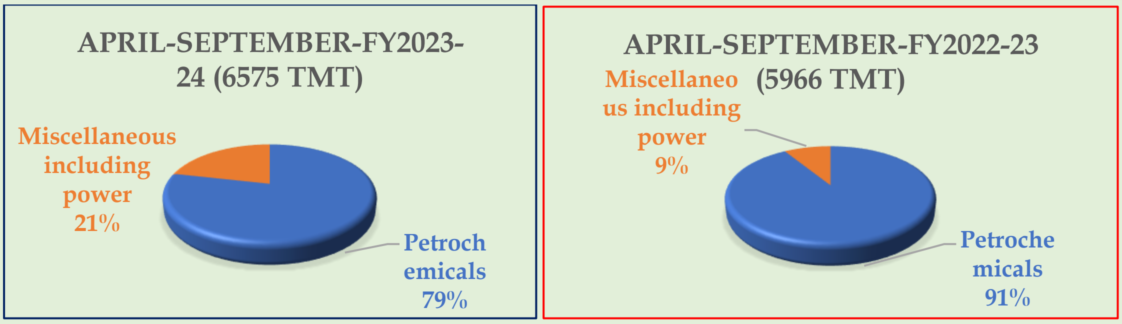


Chart-5: Sector wise naphtha consumption of 'April-September-FY2023-24' (P) and its comparison to 'April-September-FY2022-23' (P)

ATF:

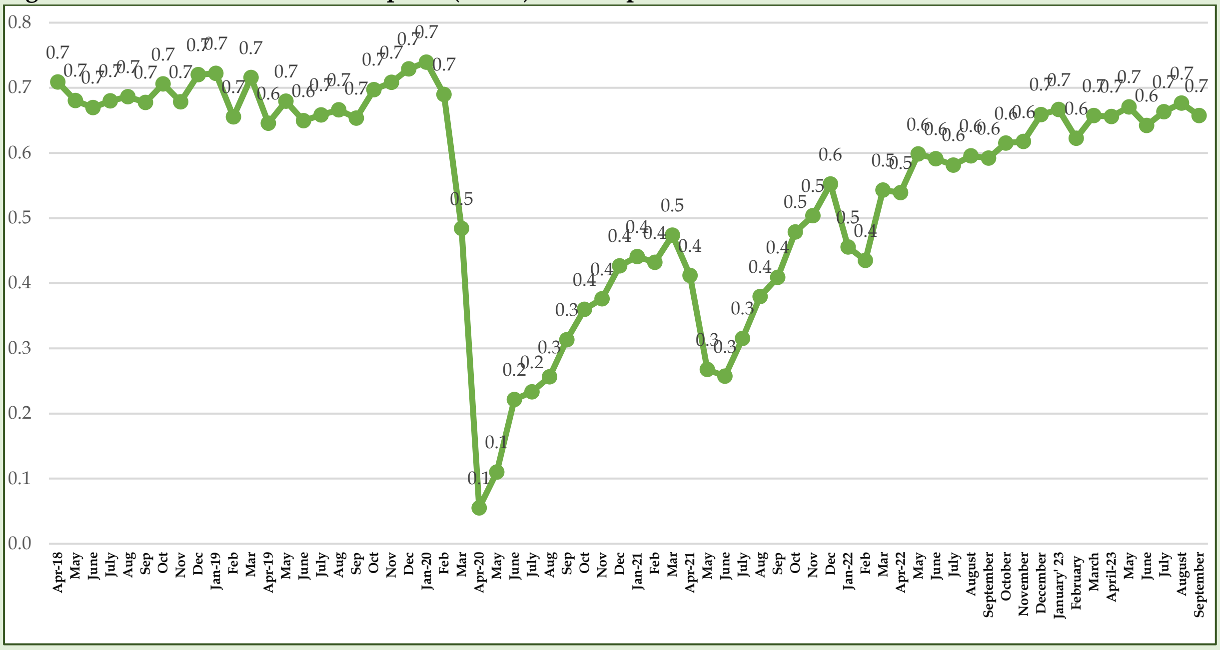
ATF consumption during September 2023 with a volume of 0.657 MMT registered a growth of 11% & 0.6% over the volume of 0.592 MMT & 0.653 MMT in September 2022 and prepandemic September-2019 respectively.

The domestic footfall is back to be comparable with pre-Covid levels, however, international traffic footfall is lagging because of restricted entry in few countries. Various local factors attributed to ATF consumption pattern are listed here:-

- Bihar & Tamil nadu (25%), Delhi & West Bengal (25%), Assam (23.66%) are maintaining high VAT rate
- Domestic footfall increased due to favourable tourism time
- ATF VAT made less in Pune and Mumbai (18% since April-23)area attributed to higher consumption growth in WESTERN region

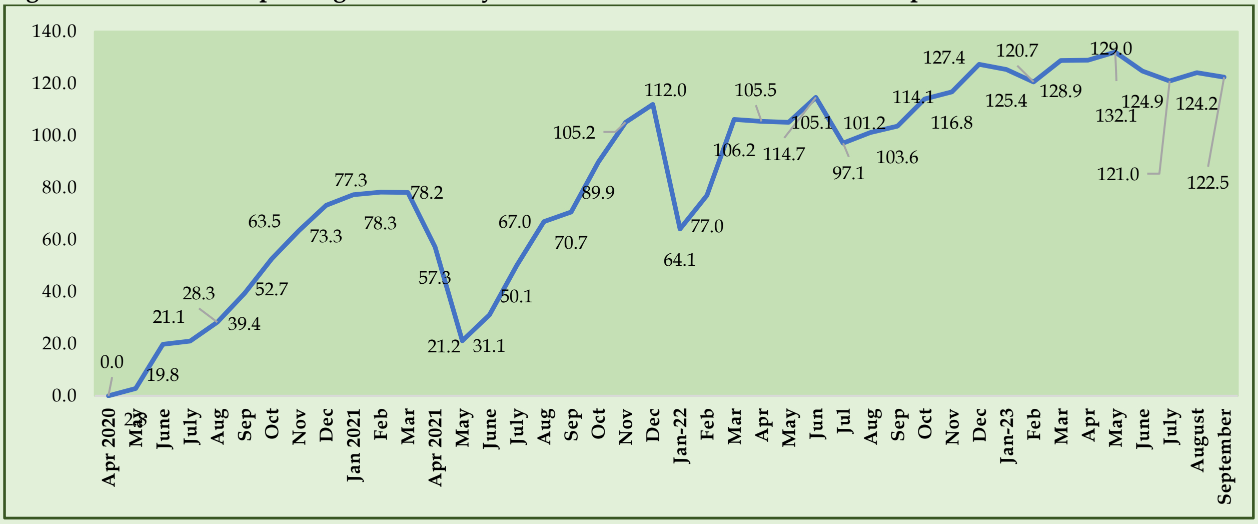
Pan India based domestic ATF monthly consumption since April-18 is shown in the Fig-9.

Figure-9: Month-wise ATF consumption (MMT) since September 2018



Passengers carried by domestic airlines during the month of September 2023 stood at 122.5 lakhs as against 103.6 lakhs during September 2022. Total domestic footfall trend for last few months are quite promising as folund in the following chart.

Figure-10: Month-wise passengers carried by domestic airlines in millions since September 2020



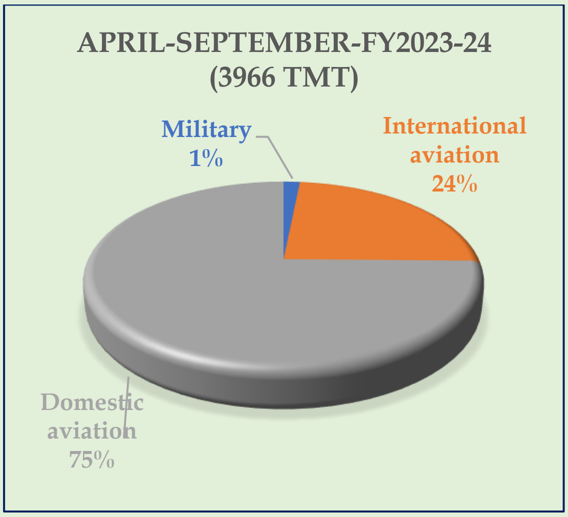
Sectoral consumption of ATF:

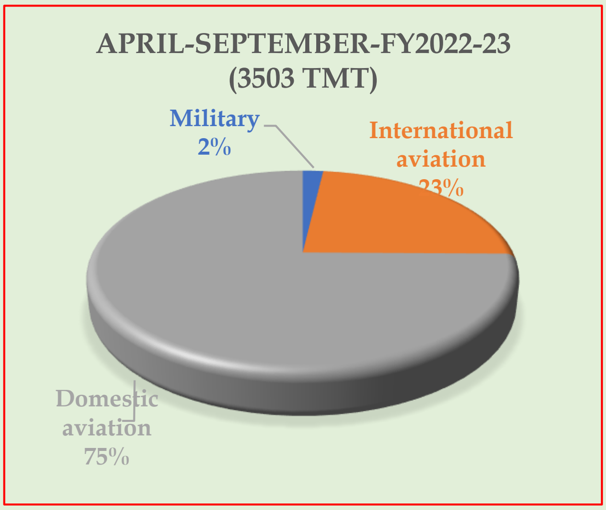
During 'April-September-FY2023-24', total ATF domestic consumption with a volume of 3.966 MMT registered 13.2% growth Year-on Year basis over the volume of 3.503 MMT in 'April-September-FY2022-23'.

Almost entire ATF during 'April-September-FY2023-24' was consumed in aviation sector ; 75% domestic aviation, 24% international aviation & 1% Military aviation.

On YoY basis, sectoral consumption international aviation increased by 1 percentage points. Details comparisons are pictorially presented in the following charts.

Chart-6: Sector wise ATF consumption of April-September-FY2023-24 (P) and its comparison to 'Apri-September-FY2022-23 (P)





FURNACE OIL & LOW SULPHUR HEAVY STOCK (FO/LSHS):

FO/LSHS consumption during September 2023 with a volume of 0.536 MMT recovered 88.6% over the volume of 0.604 MMT in September-2022.
However, the September-2023 cosnumption was 0.9% higher over the volume of 0.531 MMT in Pre-pandemic September-2019.

The growth pattern is attributed to consumption shift to LSHS from Natural gas in glass sector. Some companies shifted their internal fueling consumption from FO to CNG due to environmental obligations and to coal to ensure sustainability. Some mining companies reduced FO intake for the month due to inventory limitations. Bunkering FO consumption in Chennai and Tuticorin was less during the month. Some aluminum industries started taking FO as their internal consumption..

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

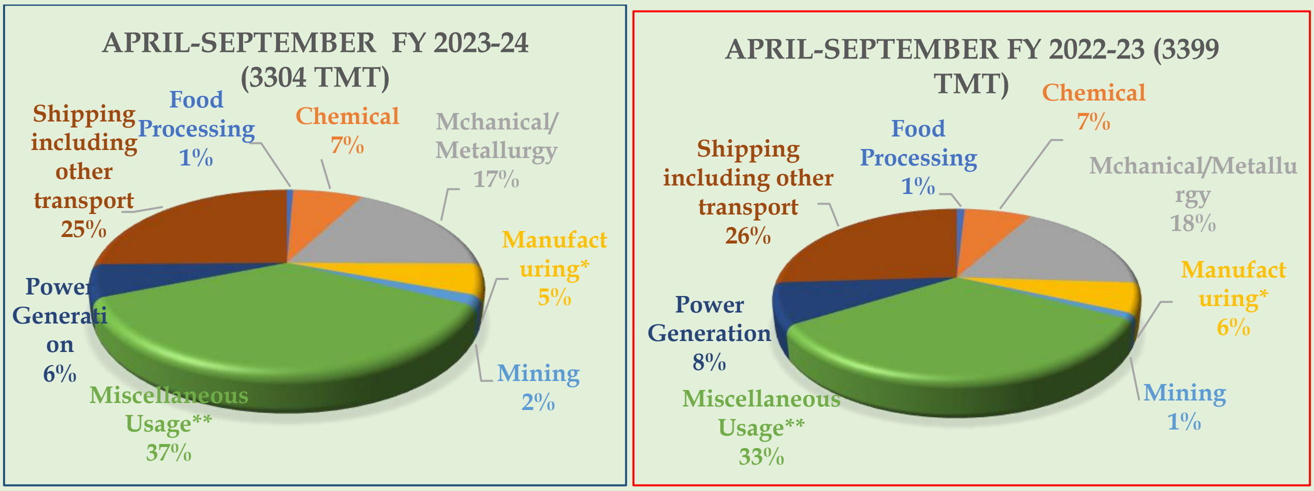
- Power sector in Southern region consumed less Fuel oil during last couple of months
- Fuel Oil sales in J&k was prohibited effective from mid September. In Punjab a cheaper substitute of FO namely CBFS, is being sold.
- Government of Punjab released a circular on 04th October-2023 on prohibiting the use of FO of 1.8% (w/w) sufur content as burning fuel by industries.

Sectoral consumption of FO/LSHS:

During 'April-September-FY2023-24', total FO/LSHS monthly domestic consumption with a volume of 3.304 MMT recovered 99.2% Year-on Year basis over the volume of 3.399 MMT in 'April-September-FY2022-23'.

Cumulative consumption of FO/LSHS during 'April-September-FY2023-24'was mainly driven by 'Miscellaneous industries' 37%, followed by 'shipping including other transport' 25%, Mechanical/ Metallurgy 17%.
On YoY basis, sectoral consumption in 'shipping including other transport' decreased by 1 percentage point. Details comparisons are pictorially presented in the following charts.

Chart-7: Sector wise FO+LSHS consumption of 'April-September-FY2023-24' and its comparison to 'April-September-FY2022-23'



*Miscellaneous Usage (37%) includes 'Bulk applications' (36.29%), Universities (0.01%), Catering & hotels (0.02%), & State electricity boards (0.23%). ** Manfacturing (6%) includes Civil engineering (0.81%), 'Electricals/electronics' (0.06%), Bulk use(2.08%), 'Textile (0.40%) and Glass & Ceramics (2.17%)	*Miscellaneous Usage (33%) includes 'Bulk applications' (31.69%), Universities (0.01%), Catering & hotels (0.01%) & State electricity boards (1.64%). ** Manfacturing (6%) includes Civil engineering (0.98%), 'Electricals/electronics' (0.05%), Bulk use(2.75%), 'Textiles' (0.35%) and Glass & Ceramics (1.52%)

PETCOKE:

Petcoke consumption during the month of September 2023 with a volume of 1.518 MMT reegistered 9.9% growth over the volume of 1.382MMT in September-2022.

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 local factors attributing to Petcoke consumption trend are listed here:-

- Petcoke was consumed in one of the Iron and Steel company due to its capacity expansion
- Due to favourable railway rake operation, September-23 petcoke sale was higher

However, Oversupply in domestic & global markets, lower price of feedstock coal & crude & sluggish demand from downstream construction sector affected the pet coke consumption.

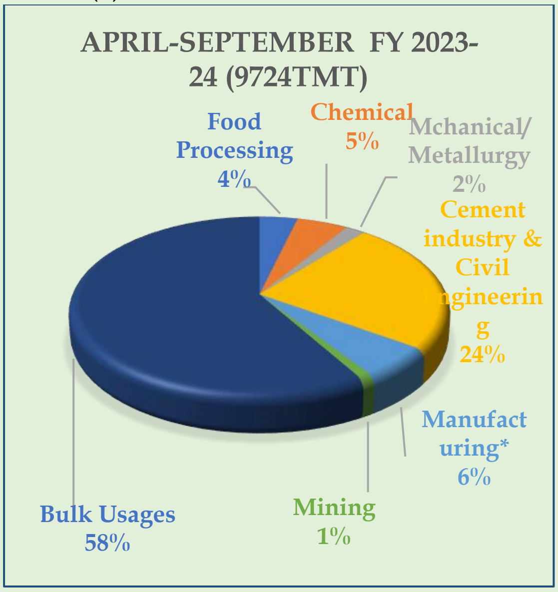
Moreover, the recent circular on ban of Petcoke as fule by Punjab Government might afftect further petcoke consumption in the sate in coming months.

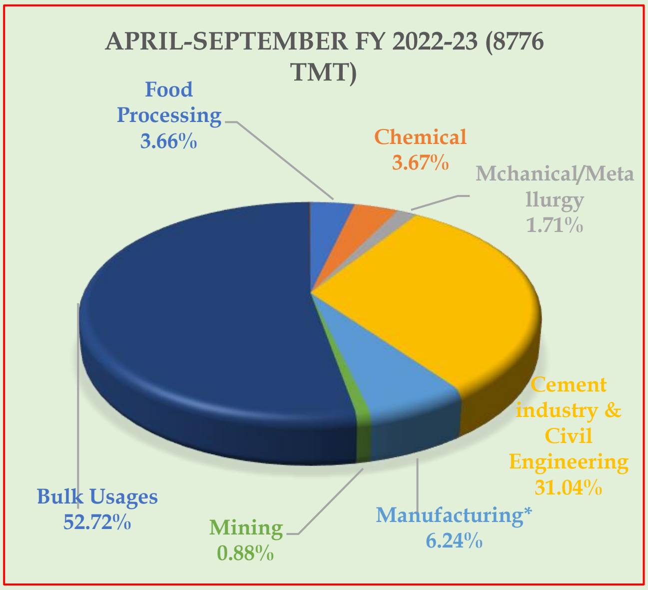
Sectoral consumption of Petcoke:

During 'April-September-FY2023-24', total petcoke monthly domestic consumption with a volume of 9.724 MMT registered 10.8% growth Year-on Year basis over the volume of 8.776 MMT in 'April-September-FY2022-23'.

The domestic sales in 'April-September-FY2023-24' (P) is driven Miscellaneous industry 58% followed by 'cement industries' 24%, Chemical Industries 5%.
On YoY basis, sectoral consumption for April-September is shown in the following charts:-

Chart-8: **Sector wise Petcoke consumption of 'April-September-FY2023-24' (P) and its comparison to 'April-September-FY2022-23' (P)**





* Manfacturing (6%) includes 'Electricals/electronics' (0.31%), Bulk use(5.46%) and 'Textiles' (0.41%)	* Manfacturing (6.24%) includes chemicals (3.61%), 'Electricals/electronics' (0.27%), Bulk use(5.87%) and 'Textiles' (0.37%)

LIGHT DIESEL OIL:

LDO consumption during the month September-2023 with a volume of 0.063 MMT registered 1.2% & 4.4% growth rate on year-on-year basis over a volume of 0.062MMT& 0.060 MMT in the month of September 2022 & 2019 respectively.
September-23 LDO consumption growth was attributed to following reasons:-

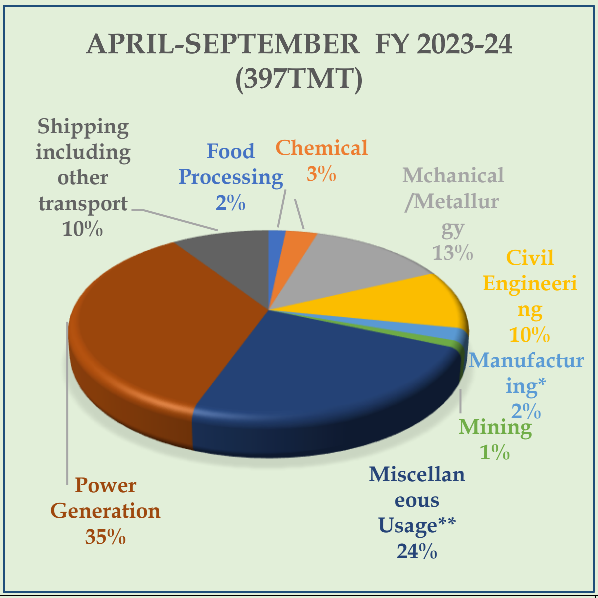
- LDO use as a fuel for industrial boilers (other than power sector) increased due to ease of PM emission standard.
- In some parts especially in southern region LDO consumption in power sector got increased due to increased power demand (25% YoY)
- LDO consumption was largely affected by available alternate fuels like FO&LSHS, LPG/CNG/ Fuel gas etc. and strategy taken by state governments to decrease emission. LDO consumption is banned in Delhi NCR, Haryana, Gujrat etc.

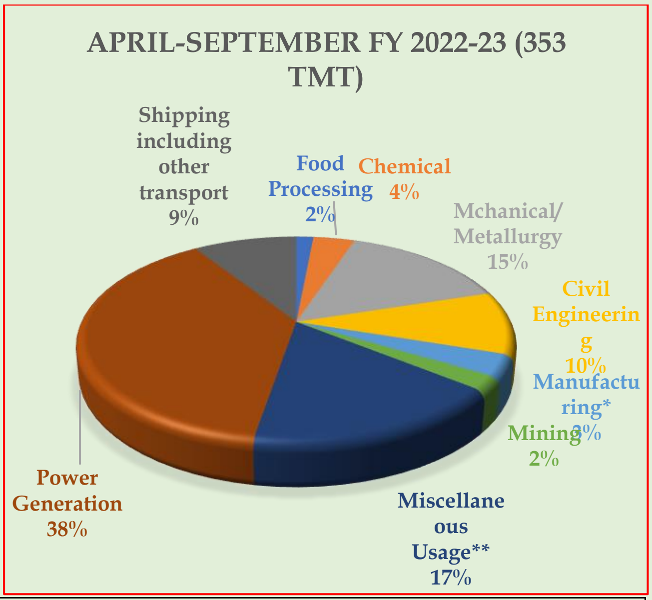
Sectoral consumption of Light Diesel Oil:

During 'April-September-FY2023-24', total LDO monthly domestic consumption with a volume of 0.397 MMT registered 12.6% growth Year-on Year basis over the volume of 0.353 MMT in 'April-September-FY2022-23'.

The cumulative consumption of Light Diesel oil (LDO) during 'April-September-FY2023-24' was driven by 'Power Generation' 35% followed by 'Miscellaneous industries' (24%) Mechanical/Metallurgy 13%. On YoY basis sectoral consumption in power generation sector decreased by 3 percentage point. Detailed comparisons are pictorially presented in the following charts.

Chart-9: Sector wise LDO consumption of 'April-September-FY2023-24' (P) and its comparison to April-September-FY2022-23'





*Miscellaneous Usage (24%) includes 'Bulk applications' (23.41%), Universities (0.06%), Catering & hotels (0.01%) & State electricity boards (0.57%). ** Manfacturing (2%) includes 'Electricals/electronics' (0.23%), Bulk use(1.86%) and 'Textiles' (0.09%)	*Miscellaneous Usage (16.97%) includes 'Bulk applications' (15.79%), Universities (0.07%), Catering & hotels (nil%) & State electricity boards (1.12%). ** Manfacturing (2%) includes 'Electricals/electronics' (0.23%), Bulk use(1.86%) and 'Textiles' (0.09%)

NATURAL GAS:

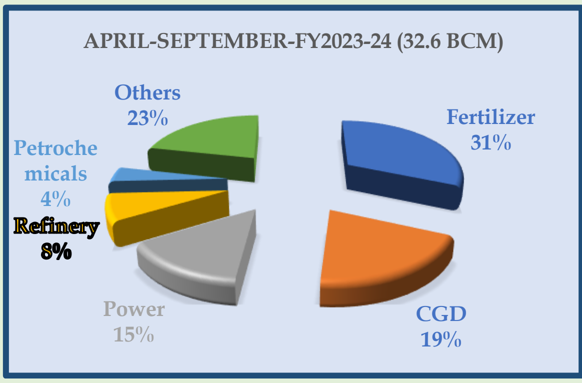
Natural Gas is used as a feedstock in several industries like fertilizers, plastics and other commercially important organic chemicals and used as a fuel for electricity generation, heating purpose in industrial and commercial units. Natural gas is also used for cooking in domestic households and as a transportation fuel for vehicles. Consumption of Natural Gas (including internal consumption) with a volume of 5.3 BCM (billion cubic meters) during the month of September 2023 registered 12.6% growth year-on year basis over the volume of 4.7 BCM in the month of September 2022

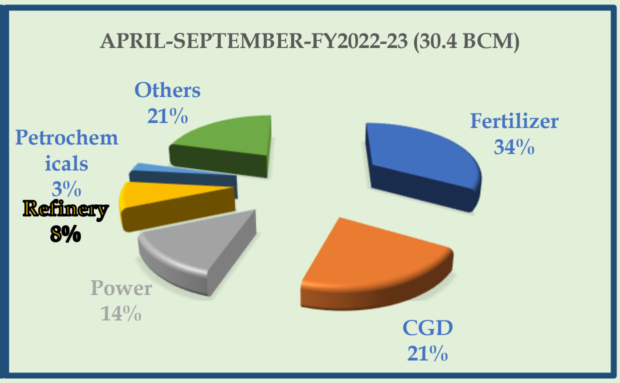
Sectoral consumption of Natural Gas consumption of 'April-September -FY2023-24'& its comparison to 'April-September-FY2022-23': (PROVISIONAL)

During 'April-September-FY2023-24', total Natural Gas monthly domestic consumption with a volume of 32.6 BCM reistered 7.1% growth, Year-on Year basis over the volume of 30.5 BCM in 'April-September-FY2022-23'

During **'April-September-FY2023-24'**, consumption of Natural gas (NG) was driven by fertilizer (31%) followed by Consumption in 'Others' category (23%), CGD (19%), Power (15%) Refinery (8%), Petrochemicals (4%). With respect to 'April-September-FY2022-23', sectoral consumption in fertilizer sector decreased by 3 percentage points, CGD sector decreased by 2 percentage point, where as Petrochemicals sector increased by 1 percentage point as shown in the following chart.

Chart-10: Sector wise consumption of Natural Gas of 'April-aUGUST-FY2023-24' (P) and its comparison to April-August-FY2022-23'





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

Source: PPAC data; P: provisional

$ Totals September not tally due to rounding off. Based on information provided by ONGC, OIL, DGH, GAIL, Torrent PowerLimited, Shell Energy India Pvt. Ltd., BPCL, RIL (P) and IOCL. Components of internal consumption related to VAP shrinkage, LPG Shrinkage, Captive Power Generation, supply to power houses, supply to crematoriums & schools etc. as reported by ONGC, OIL & DGH (prorated) have been included. Others includes sectors like Internal consumption for Pipeline System, Agriculture (Tea Plantation), Industrial, Manufacturing, LPG shrinkage, Sponge Iron and Miscellaneous	*# Totals September not tally due to rounding off. Based on information provided by ONGC, OIL, DGH, GAIL, Torrent Power Limited, Shell Energy India Pvt. Ltd., BPCL, RIL (P) and IOCL. Sectoral consumption data for GSPC is prorated.*

Conversion factors taken for MT to barrel conversion (Table-7)

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

Industry Domestic Consumption Trend in Million Barrel per Day (MBPD)(Table-8)

Industry Consumption Trend Analysis 2022-23 (Provisional)						
('Million barrels per day)						
Product	April-September			September		
	FY2022-23	FY2023-24	Growth(%)_ 2023-24 over 2022-23	2022	2023	Growth(%)_2023 over 2022
(A) Sensitive Products						
LPG	0.87	0.90	2.6	0.94	0.99	4.5
SKO	0.01	0.01	-8.7	0.01	0.01	-22.5
Sub Total	0.89	0.91	2.5	0.95	0.99	4.2
(B) Major Decontrolled Product						
HSD	1.72	1.83	6.3	1.59	1.65	3.8
MS	0.85	0.90	6.3	0.84	0.91	8.2
Naphtha	0.28	0.31	10.2	0.28	0.29	2.2
ATF	0.16	0.18	13.2	0.16	0.18	11.0
Bitumen	0.11	0.13	25.0	0.07	0.11	50.9
FO/LSHS	0.13	0.12	-2.8	0.14	0.12	-11.4
Lubes+Greases	0.07	0.08	14.3	0.06	0.08	21.9
LDO	0.01	0.02	12.6	0.02	0.02	1.2
Sub Total	3.32	3.57	7.4	3.15	3.34	6.0
Sub - Total (A) + (B)	4	4	6.4	4.11	4.34	5.6
(C) Other Minor Decontrolled Products						
Pet.Coke	0.26	0.29	10.8	0.05	0.05	9.9
Others*	0.33	0.33	-2.3	0.04	0.05	39.5
Sub Total	0.60	0.62	3.5	0.08	0.10	22.8
Total	4.80	5.09	6.0	4.19	4.44	5.9
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.						

Industry Consumption Trend Analysis 2023-24 (Provisional)

('000 MT)

Product	April-September			September								
	FY2022-23	FY2023-24	Growth(%)_ 2022-23over 2021-22	2019	2020	2021	2022	2023	Growth(%)_2023 over 2019	Growth(%)_2023 over 2020	Growth(%)_2023 over 2021	Growth(%)_2023 over 2022
(A) Sensitive Products												
LPG	13774	14135	2.6	2164	2261	2356	2441	2551	17.9	12.8	8.3	4.5
SKO	281	257	-8.7	176	167	132	41	32	-82.0	-80.9	-75.9	-22.5
Sub Total	**14055**	**14392**	**2.4**	**2340**	**2428**	**2487**	**2482**	**2583**	**10.4**	**6.4**	**3.8**	**4.1**
(B) Major Decontrolled Product												
HSD	41389	43989	6.3	5838	5487	5513	6253	6493	11.22	18.34	17.8	3.8
MS	17424	18514	**6.3**	2372	2451	2598	2827	3058	28.9	24.8	**17.7**	8.2
Naphtha	5966	6575	10.2	1102	1120	1016	977	999	-9.4	-10.9	-1.7	2.2
ATF	3503	3966	13.2	653	313	409	592	657	0.6	109.9	60.7	11.0
Bitumen	3245	4055	25.0	321	415	397	363	547	70.7	31.9	37.8	50.9
FO/LSHS	3399	3304	-2.8	531	452	543	604	536	0.9	18.5	-1.4	-11.4
Lubes+Greases	1729	1976	14.3	311	396	377	266	324	4.3	-18.2	-14.0	21.9
LDO	353	397	12.6	60	65	85	62	63	4.4	-3.8	-26.5	1.2
Sub Total	**77008**	**82777**	**7.5**	**11188**	**10700**	**10939**	**11944**	**12677**	13.3	18.5	**15.9**	6.1
Sub - Total (A) + (B)	**91062.9**	**97168.7**	**6.7**	**13527.8**	**13127.7**	**13426.5**	**14425.6**	**15259.8**	**12.8**	**16.2**	**13.7**	**5.8**
(C) Other Minor Decontrolled Products												
Pet.Coke	8776	9724	10.8	1756	1108	891	1382	1518	-13.5	37.0	70.4	9.9
Others*	7573	7401	-2.3	906	894	1282	1065	1485	64.0	66.2	15.9	39.5
Sub Total	**16350**	**17125**	**4.7**	**2661**	**2002**	**2173**	**2447**	**3004**	12.9	50.0	38.2	22.8
Total	**107413**	**114294**	**6.4**	**16189**	**15130**	**15600**	**16872**	**18263**	**12.8**	**20.7**	**17.1**	**8.2**

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

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