

INDUSTRY CONSUMPTION REPORT-POL & NG, APRIL 2023

CONTENTS

Industry CONSUMPTION Report-POL & NG, APRIL 2023	1
Petrol/Motor Spirit (MS):	8
Other factors impacting consumption of MS:	9
Other Factors impacting consumption of HSD:	11
Kerosene:	15
Bitumen:	17
LPG:	18
Naphtha:	19
ATF:	19
Furnace oil & Low sulphur heavy stock (FO/LSHS):	21
Petcoke:	21
Light Diesel Oil:	22
Natural Gas:	23
Conversion factors taken for MT to barrel conversion	23
Industry Consumption Trend Analysis 2022-23 (Provisional) in mbpd	24
Industry Consumption Trend Analysis 2022-23 (Provisional) in TMT	25

वितरण CIRCULATION:

पेट्रोलियम और प्राकृतिक गैस मंत्रालय:	MoP&NG:
<p>निजी सचिव- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) ओ एस डी- माननीय मंत्री - (पेट्रोलियम और प्राकृतिक गैस) निजी सचिव- माननीय राज्य मंत्री - (पेट्रोलियम और प्राकृतिक गैस) सचिव, पीएनजी अपर सचिव, पीएनजी अपर सचिव एवं वित्त सलाहकार संयुक्त सचिव (रिफाइनरी व मार्केटिंग) संयुक्त सचिव (एक्सप्लोरेशन व बायो रिफाइनरी) संयुक्त सचिव (जीपी) संयुक्त सचिव (जी) उप महानिदेशक, (इ एवं एस) संयुक्त सचिव (आईएफडी) संयुक्त सचिव (आईसी)</p> <p>डी जी एच: महानिदेशक (डी जी एच) ओ आई डी बी : सचिव (ओ आई डी बी) नीति आयोग: सलाहकार (ऊर्जा), नीति आयोग</p> <p>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</p>	<p>MoP&NG: 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</p>

From the desk of DG-PPAC

Greetings from Petroleum Planning & Analysis Cell!

Dear readers,

Petroleum Planning & Analysis Cell (PPAC), an attached office of the Ministry of Petroleum & Natural Gas (MoPNG), Government of India, collects and analyses data on the Oil and Gas sector.

PPAC publishes the Industry POL and NG consumption report on its website www.ppac.gov.in.

It is a critical data analysis of pan India demand of POL & NG products. The historical trend of domestic consumption of various products and their YoY and cumulative growth rate defines a clear time series profile of the demand regime. The sectoral breakup of consumption of most of the POL and NG products put a light on the actual percentage share of a finished product to its end users.

In this edition we envisaged YoY comparison of sectoral consumption breakup and its quantitative perspective. It would definitely help to figure out the transitions in granular level.

I hope the report would serve the purpose of meta data analysis for stakeholders in the oil and gas sectors, alternate energy division & the planners, policymakers, academicians, analysts, market researchers & the industries. I suggest all the stakeholders to have a look on PPAC website for various data and reports.



पेट्रोलियम योजना एवं विश्लेषण प्रकोष्ठ की ओर से अभिवादन!

प्रिय पाठकों,

पेट्रोलियम योजना और विश्लेषण सेल (PPAC), भारत सरकार के पेट्रोलियम और प्राकृतिक गैस मंत्रालय (MoPNG) का एक संबद्ध कार्यालय, तेल और गैस क्षेत्र पर डेटा एकत्र और विश्लेषण करता है।

पीपीएसी अपनी वेबसाइट www.ppac.gov.in पर उद्योग पीओएल और एनजी खपत रिपोर्ट प्रकाशित करता है।

यह पीओएल और एनजी उत्पादों की अखिल भारतीय मांग का एक महत्वपूर्ण डेटा विश्लेषण है। विभिन्न उत्पादों की घरेलू खपत की ऐतिहासिक प्रवृत्ति और उनकी साल दर साल और संचयी विकास दर मांग व्यवस्था की एक स्पष्ट समय श्रृंखला प्रोफ़ाइल को परिभाषित करती है। अधिकांश पीओएल और एनजी उत्पादों की खपत का उपयोगकर्ताओं के अनुसार सेक्टरल विभाजन उस सेक्टर के प्रतिशत हिस्से पर प्रकाश डालता है।

इस संस्करण में हमने सेक्टरल खपत और उसके मात्रात्मक परिप्रेक्ष्य की साल-दर-साल तुलना भी की है। यह निश्चित रूप से लघुतम स्तर में बदलाव का पता लगाने में मदद करेगा।

मुझे उम्मीद है कि यह रिपोर्ट तेल और गैस क्षेत्रों में हितधारकों, वैकल्पिक ऊर्जा प्रभाग और योजनाकारों,

नीति निर्माताओं, शिक्षाविदों, विश्लेषकों, बाजार शोधकर्ताओं और उद्योगों के लिए मेटा डेटा विश्लेषण के उद्देश्य को पूरा करेगी। मैं सभी हितधारकों को सुझाव देता हूँ कि वे विभिन्न डेटा और रिपोर्ट के लिए पीपीसी वेबसाइट देखें।

P. Manoj Kumar
Director General-PPAC

प.मनोज कुमार
महानिदेशक-पीपीएसी

From the desk of Director- D&ES

Subject: Industry Consumption Review

Report of PPAC: April 2023

As we entered the arena of FY2023-24, the domestic POL consumption has continued strong demand.

Taking its resolve for green energy, during inauguration of global conference on CBG, India shared the target plan to commission 5000 CBG plants in coming years.

'Bio ATF-committee' report is in line with ICAO (International Civil Aviation Organization) goal to achieve 2% annual fuel efficiency improvement by 2050 & holistically use of "CORSA sustainable aviation fuel".

IHS Markit Manufacturing Purchasing Manager's Index (PMI), e-way bill collection, GST collection etc. during the month indicated rapid momentum in Indian economy.

The crude supply to India remained flexible & the average crude price for Indian Basket in April-23 hinged around USD83.76/bbl.

The Petroleum Planning and Analysis Cell (PPAC) have prepared the monthly Petroleum Industry Consumption Review Report. The report contains analysis of consumption of POL products and natural gas with sectoral break up during April 2023 (cumulative). The same is enclosed for kind reference.

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

विषय: पीपीएसी की उद्योग बिक्री समीक्षा रिपोर्ट - दिसंबर 2022

वित्त वर्ष 2023-24 के प्रवेश में घरेलू पीओएल खपत मजबूत रही।

सीबीजी पर वैश्विक सम्मेलन के उद्घाटन के दौरान हरित ऊर्जा के लिए अपने संकल्प को लेते हुए, भारत ने आने वाले वर्षों में 5000 सीबीजी संयंत्रों को चालू करने की लक्ष्य योजना साझा की।

'बायो एटीएफ-समिति' रिपोर्ट, 2050 तक 2% वार्षिक ईंधन दक्षता सुधार प्राप्त करने और "कर्सिया टिकाऊ विमानन ईंधन" के समग्र उपयोग के लिए आईसीएओ (अंतर्राष्ट्रीय नागरिक विमानन संगठन) के लक्ष्य के अनुरूप रही।

आईएचएस मार्केट मैनुफैक्चरिंग परचेजिंग मैनेजर इंडेक्स (पीएमआई), ई-वे बिल कलेक्शन, जीएसटी कलेक्शन आदि। महीने के दौरान भारतीय अर्थव्यवस्था में तेजी से गति का संकेत दिया गया।

भारत में कच्चे तेल की आपूर्ति लचीली रही और मार्च 23 में भारतीय बास्केट के लिए कच्चे तेल की औसत कीमत लगभग **USD 83.76/bbl** थी।

पेट्रोलियम योजना और विश्लेषण प्रकोष्ठ (PPAC) द्वारा मासिक पेट्रोलियम उद्योग खपत समीक्षा रिपोर्ट तैयार की गई है। रिपोर्ट में अप्रैल- 2023 (संचयी) के दौरान सेक्टरल ब्रेक अप के साथ (पीओएल) उत्पादों और प्राकृतिक गैस की खपत का विश्लेषण शामिल है। यह आपके संदर्भ के लिए संलग्न है।

यदि इस रिपोर्ट पर आपका कोई प्रश्न है, तो कृपया श्री ऋत्विक् कुमार हातियाल को ritwik.hatial@ppac.gov.in पर लिखें।

डॉ. पंकज शर्मा

निदेशक-मांग एवं आर्थिक अध्ययन-

Dr. Pankaj Sharma

Director-D&ES

Highlights of the month:



The Union Cabinet approved the significant changes in pricing regime of APM gas benchmarking the price of APM gas to the monthly average of Indian Crude Basket price. For the month May-23, domestic NG price has been set at \$8.27 per mBTU.

In recently concluded Global Conference on Compressed Biogas (CBG), Hon'ble Minister of MoPNG shared India's target of setting up 5000 commercial plants to produce 15 MMT CBG would further boost up the share in primary energy mix. Currently, 46 CBG plants are running under SATAT scheme and around 100 outlets are dispensing CBG across the country. Thus, we are very much confident to achieve the target of 15% NG share by 2030.

Asis's largest underwater hydrocarbon project connecting Jaorhat and Majuli via Brahmaputra river has been completed by Indra Dhanush Gas Grid (IGGL). This job was carried out using horizontal directional drilling (HDD) and marked the completion of a major milestone in the construction of the North East Gas Grid (NEGG) connecting North East India to National Gas Grid.

The committee on Bio Aviation Turbine Fuel program has submitted its report on promoting clean fuel on aviation. Various OMCs have undertaken projects to make SAF from feedstocks like alcohol, animal fat etc.

The Goods and Services Tax collection marked Rs.1.87 lakh crore in April 2023; it was the highest collection ever in history. Further, it registered 12% YoY growth rate over the volume of 1.67 lakh crore INR in April 2022.

The average FOB (Free on Board) price of Indian basket crude oil during the month April-2023 was USD 83.76/bbl.

The power demand in April 2023 recovered 96.1% as compared to April 2022 and power deficit was 0.2% in the month of April 2023. The average rainfall during the month was at 41.4 mm with 5 % departures from Long Period Average (LPA). Traffic at major ports during the month of April 2023 recorded a YoY growth 1.3% of the volumes in the month of April 2022.

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

SUMMARY OF PRODUCT WISE POL CONSUMPTION PROFILE FOR APRIL-23

1. The consumption of petroleum products in April 2023 with a volume of 18.4MMT remained in line with historical for the month; however it registered 12.8 % growth on volume of 16.3 MMT in April 2021, and 0.4% growth over the pre covid volume of 18.3 MMT in April 2019.
2. MS (Petrol) consumption during the month of April 2023 with a volume of 2.9 MMT (0.85 mbpd) recorded a growth of 2.8% on the volume of 2.8MMT (0.83 mbpd) in April 2022.

The Sale of Passenger Vehicles in April-2023 with a volume of 2.84 lacs registered 12.9% growth over volume of 2.52 lacs during April-2022. Two-wheeler sales in April 2023 with a volume of 13.4 lacs marked 15.1% growth over volume of 11.6 lacs during April-2022. Three-wheeler domestic passenger vehicles touched a sales volume of 0.4 lac in April-2023 registering 104.2% YoY growth rate over a volume of 0.2 lac in April-2022.

3. HSD (Diesel) consumption during the month of April 2023 with a volume of 7.8 MMT (2 mbpd) recorded a growth of 8.6% on the volume of 7.2 MMT (1.8 mbpd) MMT in the month of April-22
4. LPG consumption during the month of April 2023 with a volume of 2.154 MMT remained almost in line with historical for the month of April 2022. As usual, LPG consumption during the month had been largely driven by consumption in domestic category.
5. ATF consumption during April 2023 with a volume of 0.66 MMT registered a growth of 18.5%, over a volume of 0.55 MMT during the month of April 2022.
6. Bitumen consumption during April 2023 with a volume of 0.7 MMT recovered 92% over a volume of 0.8 MMT in the month of April 2022.
7. Kerosene (SKO) consumption with a volume of 0.03 MMT registered a de-growth of 58% in April 2023 as compared to April 2022. SKO consumption during the month is largely constituted by PDS category 0.02MMT.
8. Average percentage of ethanol blending in petrol (EBP) marked 11.8% in April-2023. Around 44.5 cr litre ethanol has been blended in petrol under EBP program during April-2023.

9. Total Natural Gas Consumption (including internal consumption) for the month of April 2023, with a volume of 4.9 BCM, registered 1.2% growth over the volume of 4.8 BCM, in corresponding month of the previous year.

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

monthly consumption of petroleum products for April 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	April				April		
	2022	2023	% share of 2022-23	Growth (%)	2021-22	2022-23	Growth (%)
(A) Sensitive Products							
LPG	2157	2154	12	-0.2	2157	2154	-0.2
SKO	72	30	0.2	-58.0	72	30	-58.0
Sub Total	2230	2184	12	-2.0	2230	2184	-2.0
(B) Major Decontrolled Product							
HSD	7199	7820	42	8.6	7199	7820	8.6
MS	2797	2877	16	2.8	2797	2877	2.8
Naphtha	974	1083	6	11.3	974	1083	11.3
ATF	553	655	4	18.5	553	655	18.5
Bitumen	801	737	4	-8.0	801	737	-8.0
FO/LSHS	522	586	3	12.3	522	586	12.3
Lubes+Greases	318	299	2	-6.2	318	299	-6.2
LDO	52	58	0.3	10.8	52	58	10.8
Sub Total	13216	14114	77	6.8	13216	14114	6.8
(C) Other Minor Decontrolled Products							
Pet.Coke	1726	1333	7	-22.8	1726	1333	-22.8
Others*	1283	777	4	-39.4	1283	777	-39.4
Sub Total	3009	2111	11	-29.9	3009	2111	-29.9
Total	18455	18409	100	-0.2	18455	18409	-0.2

*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'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 April 2023 with a volume of 18.4 MMT remained

almost in line with historical in April 2022. The products which registered a growth in the month of April 2023 were High Speed Diesel (HSD) 8.6%, Petrol (MS) 2.8%, Naphtha 11.3%, Aviation Turbine Fuel (ATF) 18.5%, Furnace Oil & Low Sulphur Heavy Stock (FO/LSHS) 12.3% and Light Diesel Oil (LDO) 10.8% compared to April 2022.

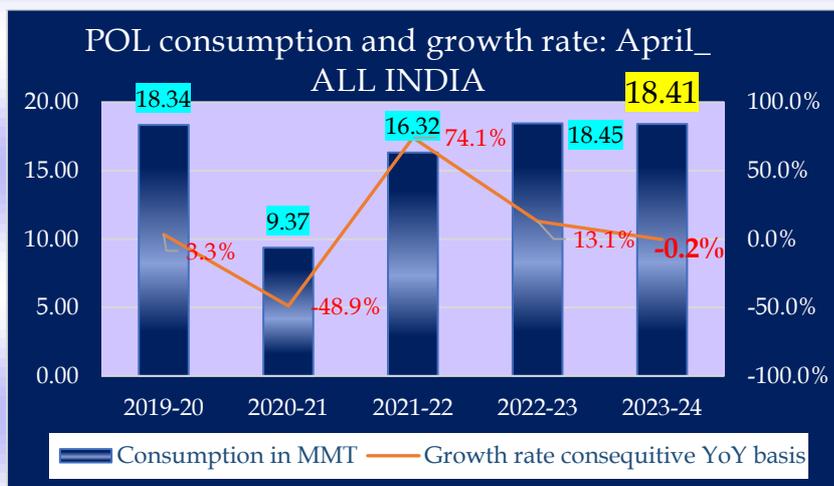
Figure-1: Monthly POL consumption (MMT) since April 2018



The overall POL domestic consumption profile during April-2023 & corresponding projected growth rate were quite promising & better than pre-covid regime as found in the radar/bar chart

of comparison between total POL consumption in the month of April in FY 2018-19 to FY2022-23 and its corresponding growth rate on YoY basis.

Chart-1: POL consumption & Growth rate YoY basis



PETROL/MOTOR SPIRIT (MS):

MS (Petrol) consumption during the month of April 2023 with a volume of 2.9 MMT registered a growth of 2.8%, 20.6%, 195.6% and 17% over the volume of 2.8MMT, 2.4MMT, 0.97MMT & 2.5MMT in April 2022, 2021, 2020 & 2019 respectively. Major factors contributing to MS consumption during the month are as follows:

- Economic momentum was well maintained during the month.
- Tourism dependent states saw a heavy influx of travelers giving a boost to economic activities; less rainfall ramped up MS consumption due to increase in mobility.
- Holiday travel attributed to higher car sales attributing increased MS consumption.

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



Utility vehicles recorded a growth of 16.3% during the current month as compared to the same period previous year.

OTHER FACTORS IMPACTING CONSUMPTION OF MS:

PASSENGER VEHICLE SALES:

The Sale of Passenger Cars in April 2023 at 1.26 lacs registered 11.4% growth YoY basis over sale of 1.13 lacs in the month of April 2022.

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

Vehicle Segment	April		
	2022	2023	Growth %age
Passenger Cars	112,923	125,758	11.4
Utility Vehicles	127,282	148,005	16.3
Vans	11,511	10,508	-8.7
Total PV	251,716	284,271	12.9

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



TWO-WHEELER SALES:

Two-wheeler sales in April 2023 with a volume of 13.39 lacs registered 15.1% growth, YoY basis over volume of 11.6 lacs during April 2022

THREE-WHEELER SALES

Three-wheeler domestic sales in April 2023 with a volume of 0.4 lac recorded a growth of 104.2%, YoY basis over the volume of 0.2 lac in April-2022.



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

Vehicle Segment	April		
	2022	2023	Growth %age
Scooters/Scotrette	388,442	464,389	19.6
Motor Cycles/Step-Throughs	735,360	839,274	14.1
Mopeds	38,780	34,925	-9.9
Total Two Wheelers	1,162,582	1,338,588	15.1
Passenger Carrier-3 wheeler	12,555	34,608	175.7
Goods Carrier-3 wheeler	7,348	5,367	-27.0
E-Rickshaw	830	2,591	212.2
E-cart	264	319	20.8
Total Three Wheelers	20,997	42,885	104.2

Source: SIAM

HIGH SPEED DIESEL (HSD):

HSD (Diesel) consumption during the month of April 2023 with a volume of 7.8 MMT recorded a growth of 8.6%, 17.1%, 140.5% & 6.8% over a volume of 7.2MMT, 6.7 MMT, 3.3MMT & 7.3MMT in the month of April 2022, 2021, 2020 & 2019 respectively.

Factors affecting diesel consumption during April 2023 are as follows:

- The harvesting season of rabi crop ramped up diesel consumption in various accessories.
- Marriage season influenced personal mobility and gave push to diesel consumption.

- Full-fledged industrial and mining activities in various parts of India increased diesel consumption.
- Election in some states of the country ramped up vehicular movement and usage of Diesel Generator etc. attributing increased HSD consumption.

IHS Markit Manufacturing Purchasing Manager's Index (PMI) marked 3 month high to 62 in April 2023 from 57.8 in February-22.

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

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

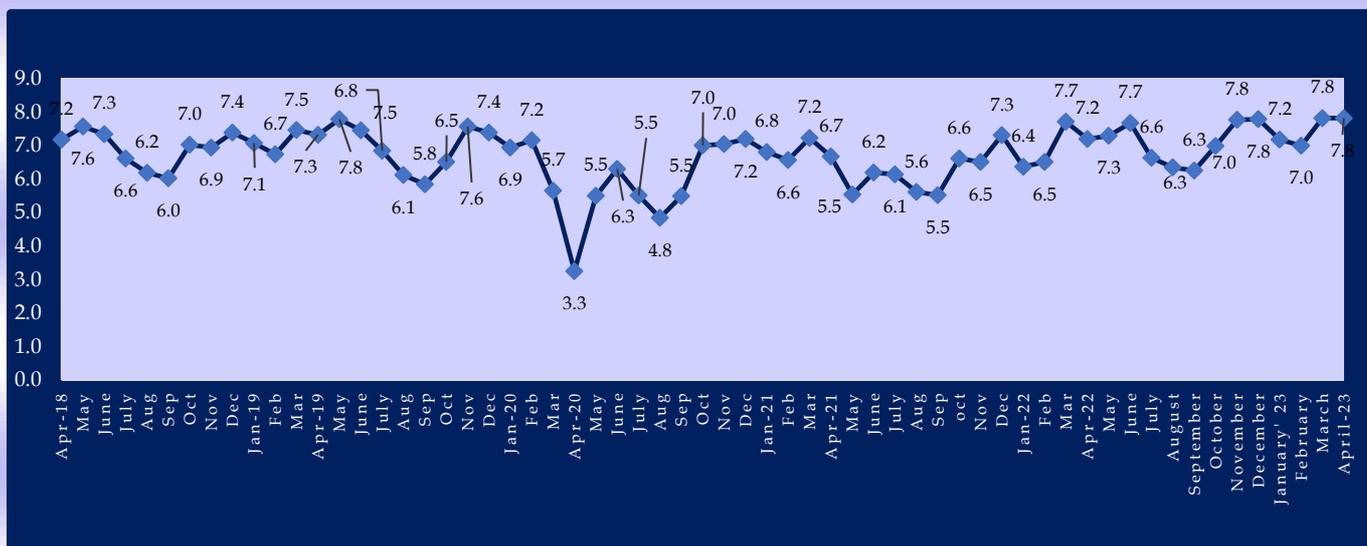
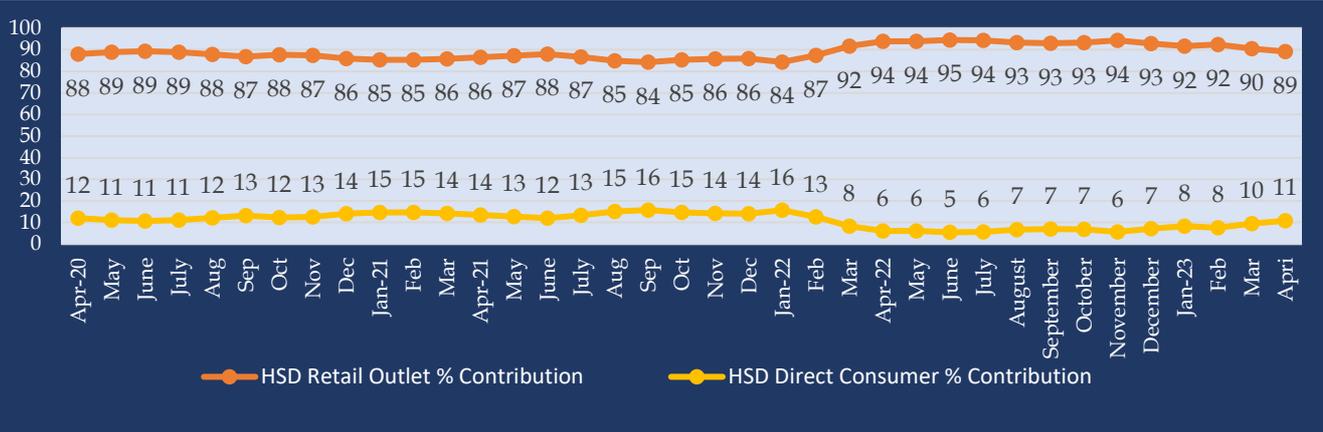


Figure-4: Share of Retail & Direct business (%) in Diesel consumption month-wise since April 2020



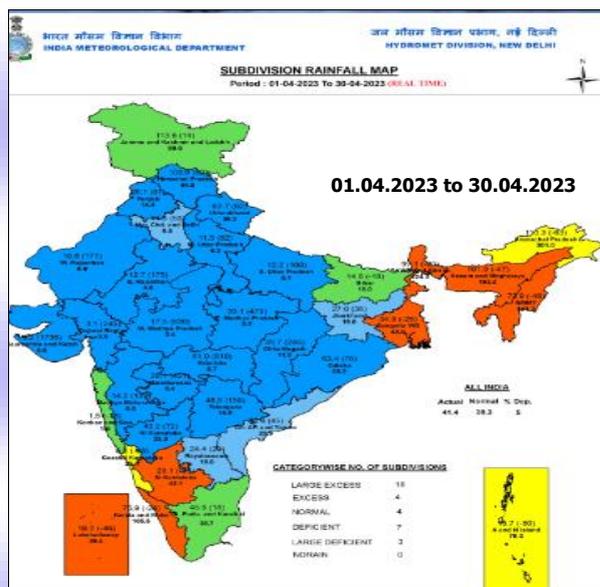
OTHER FACTORS IMPACTING CONSUMPTION OF HSD:

Seasonal rainfall scenario: The rainfall in the country during April 2023 was 5% above normal precipitation. A rainfall of 41.4 mm was recorded

in the month of April 2023 as against a normal reading of 39.3 mm.

Source: India Meteorological Department (IMD)

Out of total 36 subdivisions, 22 division received excess to large excess rainfall, 10 divisions received deficient rainfall whereas 4 division received normal rainfall.



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.

For the month of April, the volume of e-way bills generated was notch 8.5 Cr. INR

Electronic permits for goods transportation within and across states registered 84 million in April-23 and this was the second highest value so far.

COMMERCIAL VEHICLE

Based on data from Fada Research, Indian domestic sales of commercial vehicles recovered 99% during the month of April 2023 as compared to April 2022 as shown in Table-4.

TRACTOR SALE:

Tractor domestic sales in April 2023 with a volume of 1.699 lacs registered 0.4% growth over the volume of 1.692 lacs in April 2022. Harvesting season of Rabi crop and moderate rainfall increased the growth in tractor sales during the month April-2023 as shown in the table.

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

Commercial vehicles & tractors		April		
		2022	2023	Growth % age
CV	LCV	47,625	43,501	-8.7
	MCV	5,575	6,451	15.7
	HCV	28,558	32,165	12.6
	Others	3,470	2,229	-35.8
Total CVs		85,228	84,346	-1.0
Tractors		169,215	169,933	0.4

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- Commercial Vehicle is subdivided in the following manner

- LCV - Light Commercial Vehicle (incl. Passenger & Goods Vehicle)
- MCV - Medium Commercial Vehicle (incl. Passenger & Goods Vehicle)
- HCV - Heavy Commercial Vehicle (incl. Passenger & Goods Vehicle)
- Others - Construction Equipment Vehicles and others

PORT TRAFFIC:

The traffic handled at major ports in India with a volume of 66 MMT in April 2023 recorded a growth of 1.3% on YoY basis over the volume of 65 TMT in April-22.

Growth was observed in cargo handled during the month of April 2023 in all the major ports like Kolkata & Haldia 7%, Kamarajar 10.2%, Chennai 14.4%, V.O.Chidambaranar 21.3%, Cochin 2.5%, New Mangalore 16.4%, Mumbai 3.7% and JNPA (revised from JNPT in Nov-22) 6.7% with respect to April-2022.

During 'April-23', sector wise growth was registered in coal (thermal, steam and coking) 38.4%, Finished Fertilizers 33%, Containers 5% with respect to 'April-22'.

The Percentage tonnage share in Mar-23 was maximum in CPOL 29.7% followed by Coal (thermal, steam and coking) 25% and container-tonnage & TEUs 23.9% & other miscellaneous cargo 10%, Iron ore & pellets 7.2% and fertilizer (finished & dry) 2%.



Figure-5: Growth percentage of traffic handled at major ports since April 2020

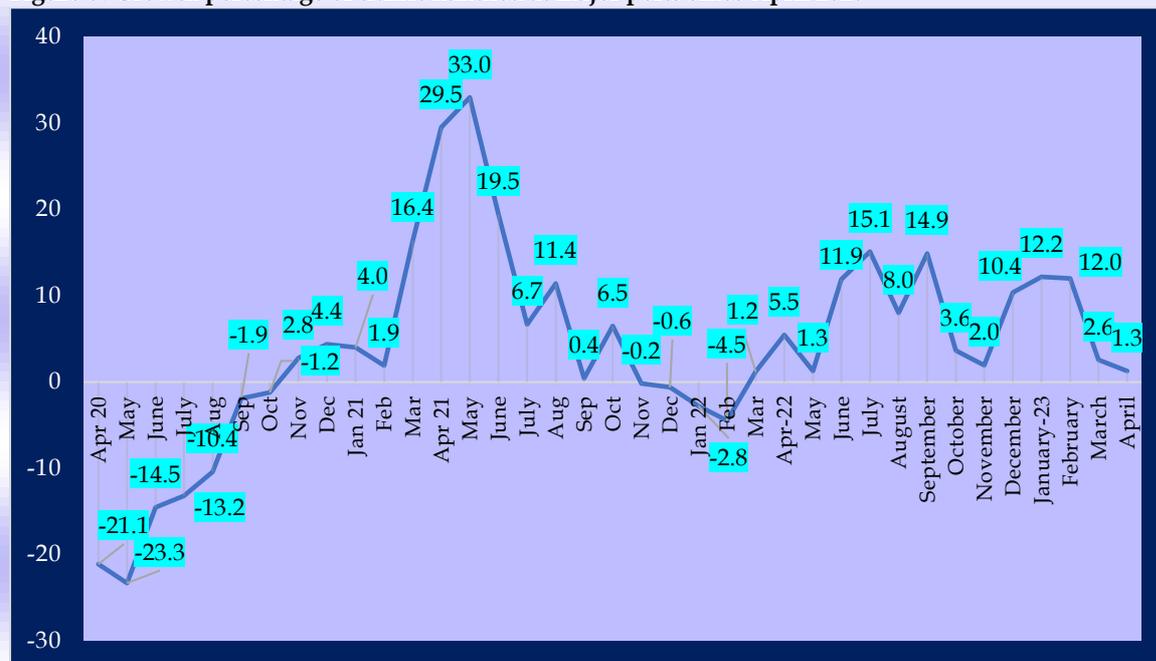


Table-5: Traffic handled at major ports in April 2023(Qty in TMT)

Ports	April 2022	April 2023	Growth (%)
Kolkata & Haldia	4,333	4,638	7.0
Paradip	12,196	11,668	-4.3
Visakhapatnam	6,294	6,146	-2.4
Kamarajar (Ennore)	3,723	4,103	10.2
Chennai	3,475	3,975	14.4
V.O. Chidambaranar	2,814	3,413	21.3
Cochin	2,814	2,884	2.5
New Mangalore	3,553	4,135	16.4
Mormugao	1,853	1,551	-16.3
Mumbai	5,417	5,620	3.7
JNPT	6,823	7,279	6.7
Deendayal	11,732	10,461	-10.8
Total:	65,027	65,873	1.3

Source: ipa.nic.in

Power situation:

The position of power supply for the month of April 2023 is given in Table-5. As per the data reported, power deficit position was 0.2% in April-2023 whereas it was 2% in April-2022. The

requirement of power in April 2023 was 1,29,503 MU and has recorded a degrowth of 3.9% over requirement of power at 1,29,503 MU in the month of April 2022.



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

	April-2022			April-2023		
	Requirement	Supplied (MU)	Deficit %	Requirement	Supplied (MU)	Deficit %
North	38,566	37,070	-3.9%	33,496	33,361	-0.4%
West	43,931	43,556	-0.9%	42,285	42,276	0.0%
South	34,423	33,926	-1.4%	36,730	36,721	0.0%
East	16,505	16,132	-2.3%	15,471	15,378	-0.6%
North-East	1,356	1,346	-0.7%	1,522	1,479	-2.8%
Total	134,781	132,028	-2.04%	129,503	129,216	-0.22%

Source: Central Electricity Authority (CEA)

Sectoral consumption of HSD:

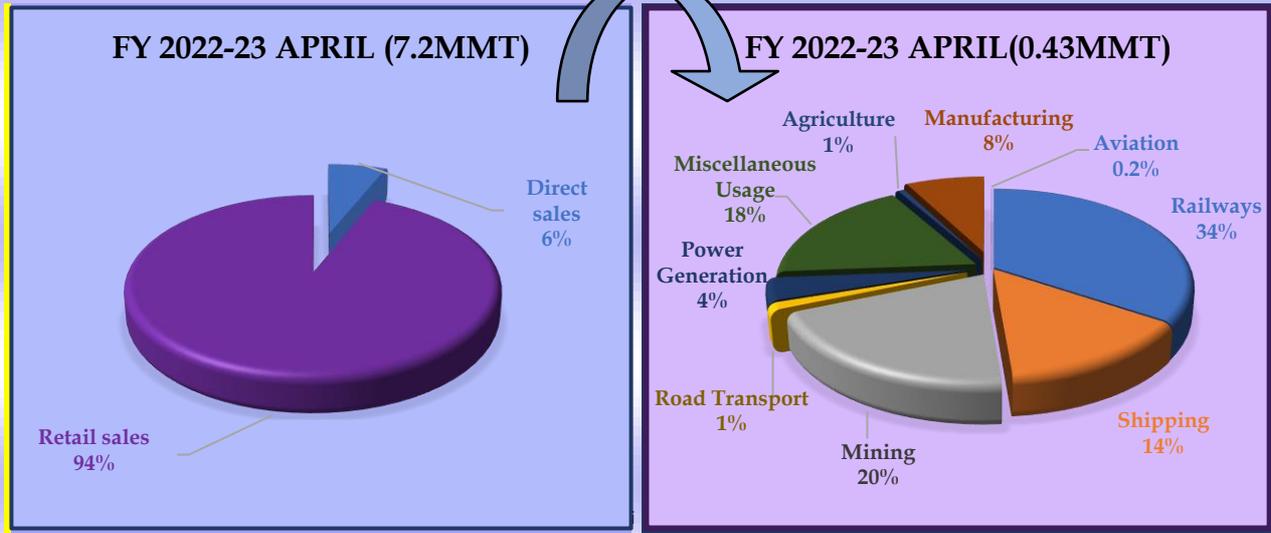
89% of cumulative HSD consumption during April-2023, was constituted by retail sales. Balance 11% falls under direct sales category as shown in 5A/B chart. Whereas the bifurcation was 94:6 in FY2021-22.

In direct sales category, the sectoral consumption break up is shown in 5B chart; i.e., for April-2023 'Miscellaneous usage' share was 26% followed by

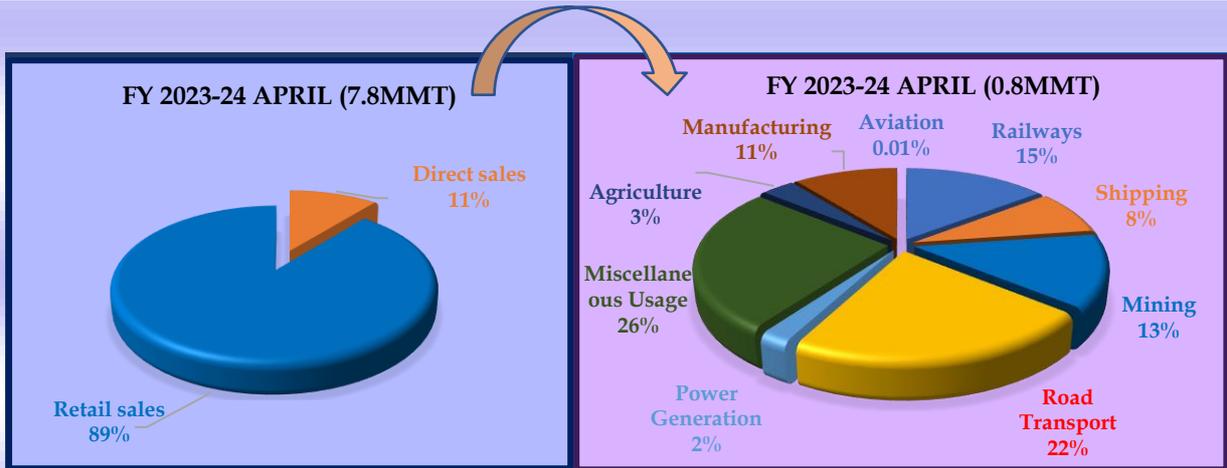
'Road Transport' 22%, Railways share was 15%, Mining 13%, Shipping 8%, Manufacturing 11%, Agriculture 3% and Power Generation 2%. Most of the retail sales are consumed in road transport. With respect to April-23, sectoral consumption in April-22 in Railways decreased by 19 percentage points and shipping 6 percentage points whereas Road Transport is increased by 21 percentage points. Details comparisons are pictorially presented in the following charts.



Chart-2: Sector-wise HSD consumption in April 2023 (P) and its comparison with April-22 (P)



*Manufacturing (8%) includes 'Iron / Steel & metallurgy' (2.76%), chemicals (1.83%), Civil engineering (2.25%), 'Electricals/electronics' (0.19%), 'Textiles' (0.09%) and 'Consumer industrial goods' (0.43%)
 **Miscellaneous Usage (18%) includes 'Bulk applications' (16.2%), Universities (0.03%), Catering & hotels (0.06%), Posts & telegraphs (0.007%), State electricity boards (0.0097%), and 'other distributions' (1.097%)



*Manufacturing (11%) includes 'Iron / Steel & metallurgy' (1.7%), chemicals (0.7%), Civil engineering (7.2%), 'Electricals/electronics' (0.07%), 'Textiles' (0.07%) and 'Consumer industrial goods' (0.9%)
 **Miscellaneous Usage (26%) includes 'Other industrial applications' (23.2%), Universities (0.02%), Catering & hotels (0.03%), Posts & telegraphs (0.002%), State electricity boards (0.03%)

KEROSENE:

Kerosene consumption during April-2023 with a volume 0.03MMT registered de-growth of 58%, 71.2%, 76.5% and 88.1% over the volume of 0.072MMT, 0.105MMT, 0.129 MMT and 0.254 MMT in April-22, 21, 20 & 19 respectively. 1484KL of non-subsidized PDSSKO sales have been registered during the month

for the state of Karnataka (356KL) and Kerala (1128KL).

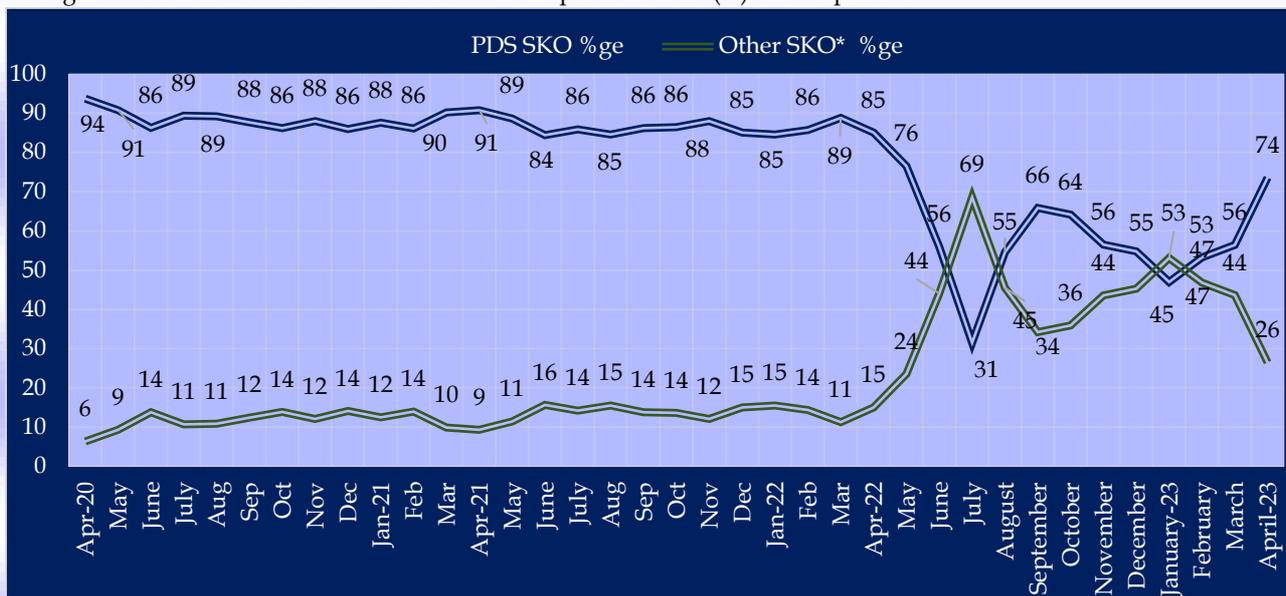
In PDSSKO upliftment, West Bengal (19954 KL) was the biggest consumer followed by Tamil Nadu (2712KL) and Bihar (2064KL). The market share of

subsidized-PDS and other SKO was 74% & 26% respectively.

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.

Figure-6: Month-wise PDS & other-SKO consumption in share (%) since April 2020



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

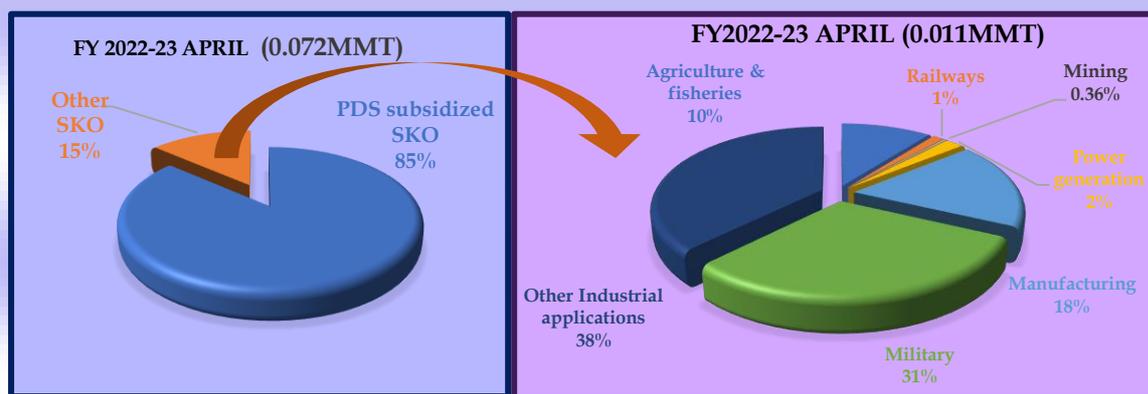
Sectoral consumption of SKO:

Out of total SKO sales during April-23 'PDS domestic SKO' upliftment constituted to 74%. So far as SKO sales in 'non-PDS commercial sector is concerned,' 43% accounted to Industrial applications followed by Military 28%, manufacturing 13%, agriculture &

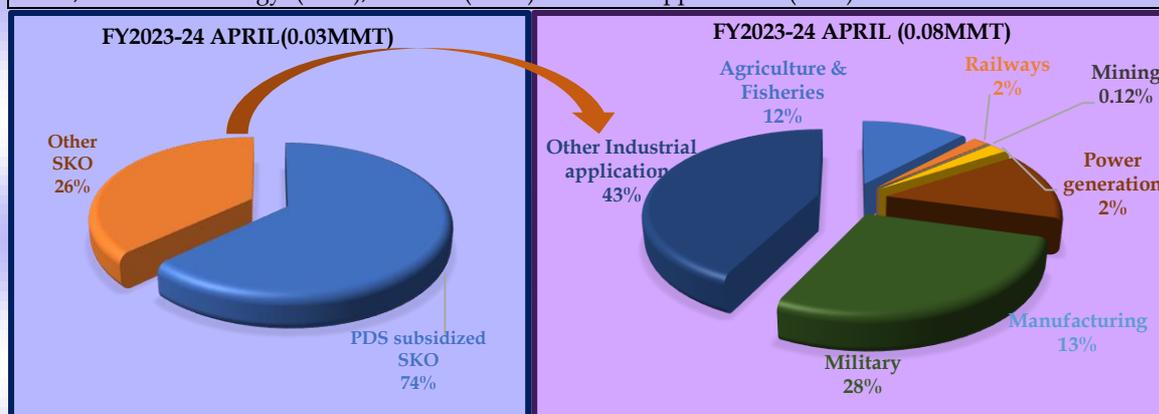
fisheries 12%. With respect to April-22, sectoral consumption in April-23 in agriculture & fisheries increased by 2 percentage points and manufacturing decreased by 5 percentage points. Details comparisons are pictorially presented in the following charts



Chart-3:PDS domestic, non-PDS commercial SKO sales & their breakup for April 2023 (P) and its comparison with April-22



Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
 **Manufacturing (18%) includes 'Chemicals' (2.9%), 'Civil engineering' (6.4%), 'Electrical/electronics' (1%), 'Iron, steel & metallurgy' (3.4%), 'Textiles' (0.1%) and 'Bulk applications' (4.2%)



Other SKO includes 'Nonsubsidized PDS SKO', 'non-PDS SKO' and 'Imported SKO'
 **Manufacturing (13%) includes 'Chemicals' (3.3%), 'Civil engineering' (5.1%), 'Electrical/electronics' (0.03%), 'Iron, steel & metallurgy' (2.4%), 'Textiles' (0.04%) and 'Bulk applications' (2.8%)

BITUMEN:

Bitumen consumption during April 2023 with a volume of 0.74 MMT recovered 92% & 90.1% over a volume of 0.8 MMT & 0.82 MMT in the month of April 2022 & 2021 respectively; however, it registered a growth of 295% & 6.7% over the volume of 0.19 MMT & 0.7 MMT in April-2020 & 2019 respectively.

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

- The new construction projects are yet to be declared at the advent of new FY2023-24
- In some states construction activity was affected by non-uniform rainfall.

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



Sectoral consumption of Bitumen:

95% of cumulative bitumen sales during FY2022-23, was constituted to Road construction, balance 5% was consumed by miscellaneous industries.



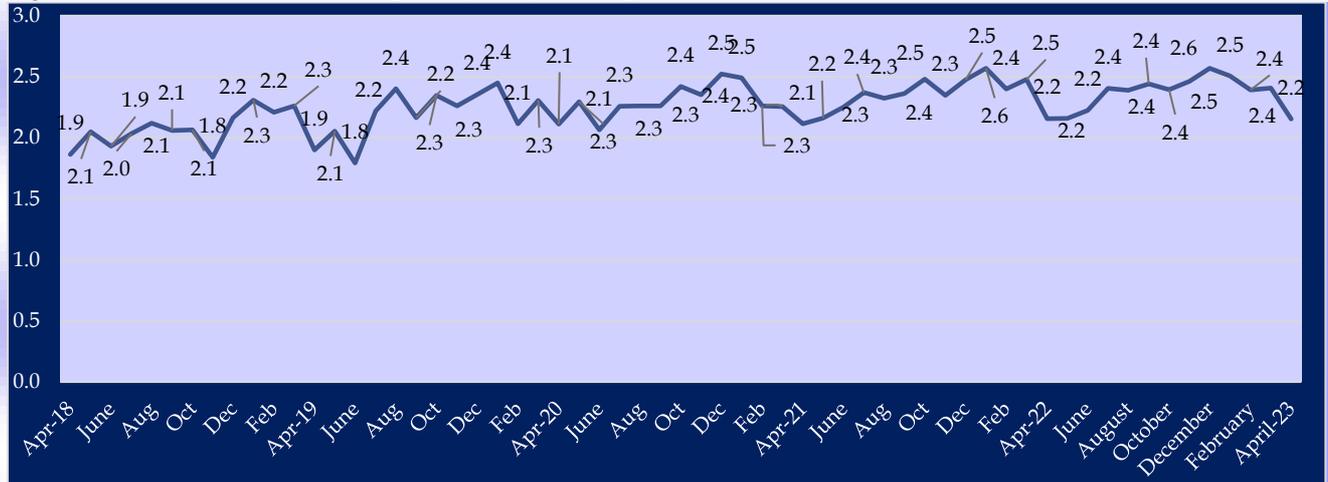
LPG:

LPG consumption during the month of April 2023 with a volume of 2.154MMT remained almost in

line with historical in April-2022. However, it registered a growth rate of 2.5 %, 1.9% & 13.4% over the volume of 2.102MMT, 2.113MMT & 1.90 MMT in the month of April 2021, 2020 & 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.

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

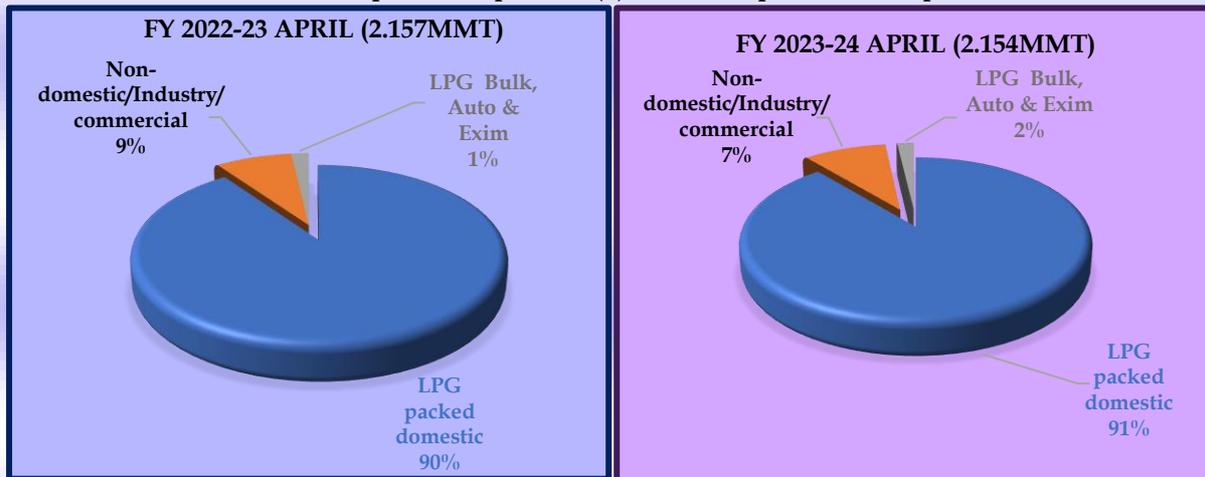


Sectoral consumption of LPG:

The Sectoral LPG consumption during April-23, was driven by packed domestic category 91%, followed by 'non-domestic/industry/commercial

sector 7% & 'LPG Bulk, Auto & Exim '2%. With respect to April-22, sectoral consumption profile in April-23 in LPG were remained almost the same pattern.

Chart-4: Sector wise LPG consumption for April 2023 (P) and its comparison with April-22



NAPHTHA:

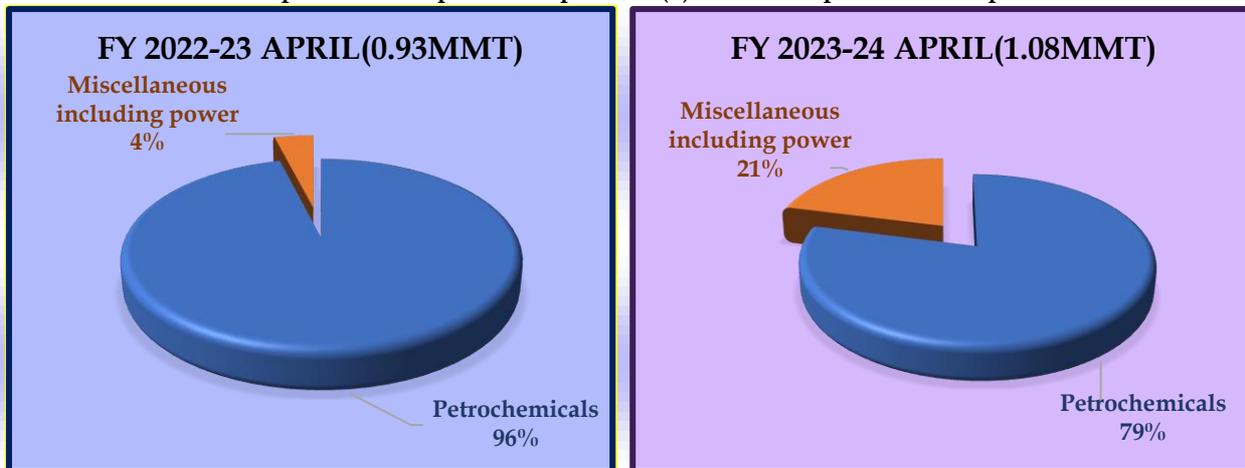
Naphtha consumption during the month of April 2023 with a volume of 1.08 MMT registered 11.3%, 48.4% & 12.1% growth rate with respect to the volume of 0.97 MMT, 0.73 MMT, 0.966 MMT in April 2022, 2020 & 2019 respectively; however, it recovered 93.1% over the volume of 1.2MMT, in April 2021.

Petrochemical industries remain the main consumers of naphtha.

Sectoral consumption of Naphtha:

Consumption of naphtha during 'April-23' with a volume of 1.08MMT was driven by petrochemicals sector 79%, whereas 21% naphtha consumption fell in 'miscellaneous industries including power'. With respect to April-22, sectoral consumption in April-23. in the petrochemicals sector decreased by 17 percentage points. Detailed comparisons are pictorially presented in the following charts.

Chart-5: Sector wise naphtha consumption for April 2023 (P) and its comparison with April-22



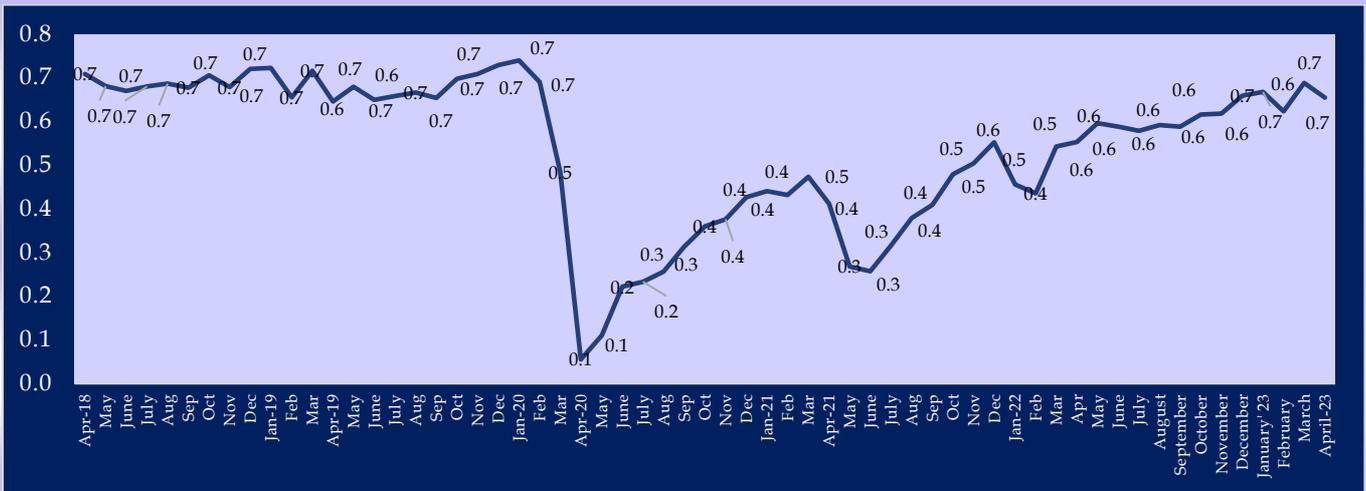
ATF:

ATF consumption during April 2023 with a volume of 0.66 MMT registered a growth of 18.5%, 59%, 1086.7% & 1.4% over the volume of 0.553 MMT, 0.412MMT, 0.06MMT and 0.646 MMT in April 2022, 2021, 2020 & 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.

Month wise ATF consumption since April-2018 is depicted in Figure-9.

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



Passengers carried by domestic airlines during the month of April 2023 stood at 129 lakhs as against 105 lakhs during April 2022. There has been a steady increase in passenger traffic month over month since

last six months. April-30 records the all-time high domestic passenger of 4,56,082 numbers handed by Indian air ports via 2,978 flight operations.

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



Sectoral consumption of ATF:

Almost entire ATF consumption during April-24, attributed to aviation sector; 76% domestic aviation, 24% international aviation & 0.06% military aviation.

Military aviation. With respect to April-23, sectoral consumption in FY2023-24 in international aviation increased by 1 percentage points. Details comparisons are pictorially presented in the following charts.

Chart-6: Sector wise ATF consumption for April 2023 (P) and its comparison with April-22



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

FO/LSHS consumption during April 2023 with a volume of 0.586 MMT registered growth of 12.3%, 13.3%, 107.2% & 17.6% over the volume of 0.522 MMT, 0.517MMT, 0.283MMT and 0.498MMT in April-2022, 2021, 2020 & 2019 respectively.

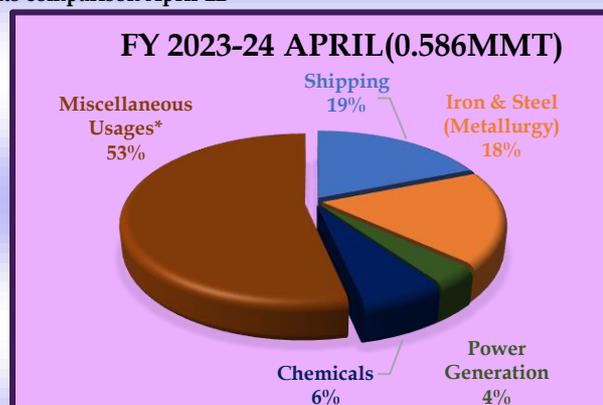
The higher growth rate is attributed to consumption shift from gas to LSHS in refining, chemical, glass sector. Though few companies shifted their internal fueling consumption from FO to CNG due to environmental obligations and to coal to ensure sustainability. Some mining companies' FO intake for the month was less due

to inventory limitations. Bunkering FO consumption in Chennai and Tuticorin was less during the month. Some aluminum industries started taking FO as their burning fuel.

Sectoral consumption of FO/LSHS:

Cumulative consumption of FO/LSHS during April-23 was driven by 'Miscellaneous industries' 53%, followed by 'shipping' 19% 'Iron & steel (metallurgy)' 18%, chemicals' 6% 'Power generation 4% as shown in the chart. With respect to April-22, sectoral consumption in April-23 in 'shipping' increased by 2 percentage points. Details comparisons are pictorially presented in the following charts.

Chart-7: Sector wise FO+LSHS consumption in April-23 and its comparison April-22



\$ *Miscellaneous usage (48%) includes 'catering & hotels' (0.01%), Bulk Applications (47%), Military (0.02%), State Electricity Board (0.89%), Universities (0.004%) etc.

*Miscellaneous usage (53%) includes 'catering & hotels' (0.02%), Bulk Applications (52.7%), Military (0.03%), State Electricity Board (0.28%), Universities (0.01%) etc.

PETCOKE:

Petcoke consumption during the month of April 2023 with a volume of 1.333 MMT recovered 77.2% & 59.2% over the volume of 1.726 MMT & 2.254 MMT in April-2022&2019 respectively; however, it registered 67.3% and 71.9% growth over the volume of 0.79 MMT & 0.77 MMT in April-2021 & 2020 respectively.

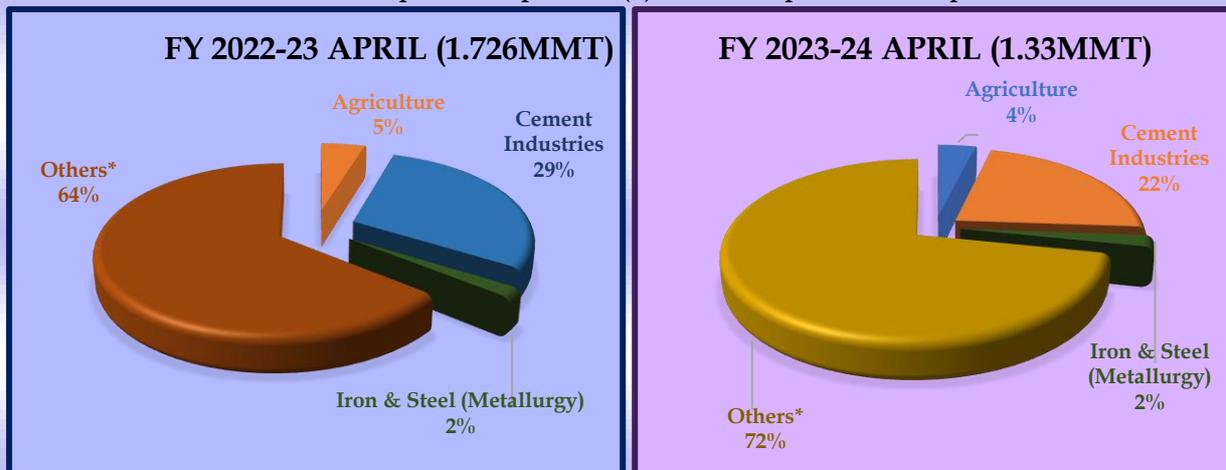
Directorate General of Foreign Trade (DGFT) under Ministry of Commerce and Industry has banned import of petcoke for use as fuel but has allowed its import only for use as feedstock in

some select industries such as cement, lime kiln, calcium carbide and gasification industries.

Sectoral consumption of Petcoke:

The domestic sales in April-23 is driven by 'others' 72%, followed by 'cement industries' 22%, Agriculture 4%. With respect to April-22, sectoral consumption in cement industries in April-23, decreased by 7 percentage points. Details comparisons are pictorially presented in the following charts.

Chart-8: Sector wise Petcoke consumption for April 2023 (P) and its comparison with April-22



*Others (64%) includes chemicals (5.2%), Textiles (0.5%), Mining (1.0%), Power Generation (0.2%) and bulk applications (57.1%) etc.

*Others (72%) includes chemicals (4.4%), Textiles (0.4%), Mining (1.2%), Power Generation (0.1%) and bulk applications (65.9%) etc.

LIGHT DIESEL OIL:

LDO consumption during the month April-2023 with a volume of 0.058 MMT registered 10.8%, 108.4%, 28.3% growth rate on year-on-year basis over a volume of 0.052MMT,0.28MMT & 0.45 MMT in the month of April 2022, 2020 & 2019 respectively. However, it recovered 60.2% over the volume of 0.096MMT in April-2021.

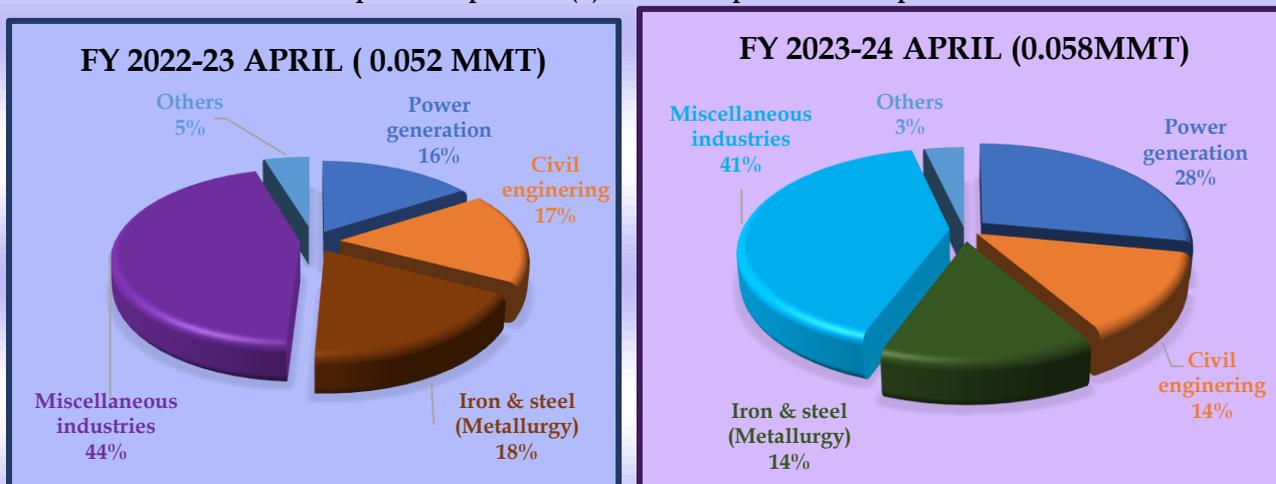
Sectoral consumption of Light Diesel Oil:

The cumulative consumption of Light Diesel oil (LDO) during April-23 was driven by 'Power Generation' 28% followed by 'Miscellaneous industries' (41%) 'Iron& Steel (Metallurgy) 14%,

and Civil Engineering 14%. With respect to April-22, sectoral consumption in April-23 in power generation sector is increased by 12 percentage points. Detailed comparisons are pictorially presented in the following charts.

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. LDO is used to heat bitumen. De-growth in bitumen consumption effected LDO consumption in some parts of the country.

Chart-9: Sector wise LDO consumption of April 2023 (P) and its comparison with April-22



*Miscellaneous (44%) industries include chemicals (4.4%), electrical & electronics (0.6%), Industrial goods (5.6%) and textiles (0.5%) 'bulk category' (33.4%)

*Miscellaneous (41%) industries include chemicals (2.9%), electrical & electronics (0.2%), Industrial goods (2.8%) and textiles (0.1%) & bulk category (34.8%)

**Others (5%) includes Road Transport (0.2%), Agriculture (2.1%), Mining (1.2%), Railways (0.1%) and shipping (1.0%) etc.

**Others (3%) include Road Transport (0.1%), Agriculture (2.3%), Mining (0.2%), Railways (0.03%) and shipping (1%) etc.

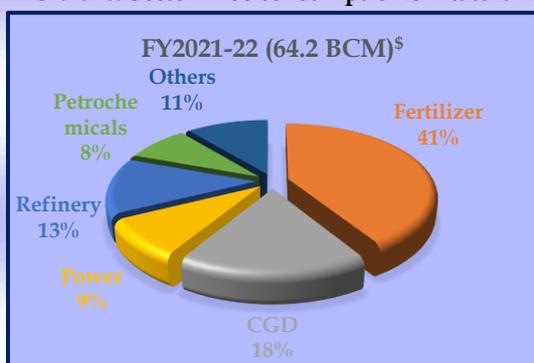
NATURAL GAS:

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 with a volume of 4.9 BCM (billion cubic meters) during the month of April 2023 registered 1.2% growth, year-on year basis over the volume of 4.8 BCM in the month of April 2022

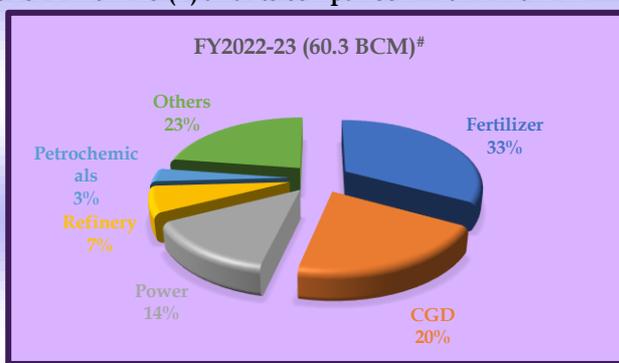
Sectoral consumption of Natural Gas consumption for FY2022-23 & its comparison with FY2021-22: (PROVISIONAL)

During FY2022-23, consumption of Natural gas (NG) with a volume of 60.3 BCM was driven by fertilizer (33%) followed by CGD (20%), Power (14%) Refinery (7%), Petrochemicals (3%) and others (23%). With respect to FY2021-22, sectoral consumption in FY2022-23 in fertilizer sector decreased by 8 percentage points where as CGD increased by 2 percentage points

Chart-10: Sector wise consumption of Natural Gas for FY2022-23 (P) and its comparison with FY2021-22



March-21 to April-22



March-22 to April-23

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

Source: PPAC data; P: provisional

§: Totals may 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 for the April-September 2022 period. 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 updated. Others includes sectors like Internal consumption for Pipeline System, Agriculture (Tea Plantation), Industrial, Manufacturing, LPG shrinkage, Sponge Iron and Miscellaneous.

#: Totals may 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 and IOCL. Sectoral consumption data for GSPC is prorated. 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 have been updated in the FY 2021-22.

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		Growth(%)_2023-24over 2022-23	April		
	FY2022-23	FY2023-24		2022	2023	Growth(%)_2023 over 2022
(A) Sensitive Products						
LPG	0.83	0.83	-0.2	0.83	0.83	-0.2
SKO	0.02	0.01	-58.0	0.02	0.01	-58.0
Sub Total	0.85	0.84	-1.5	0.85	0.84	-1.5
(B) Major Decontrolled Product						
HSD	1.83	1.98	8.6	1.83	1.98	8.6
MS	0.83	0.85	2.8	0.83	0.85	2.8
Naphtha	0.28	0.31	11.3	0.28	0.31	11.3
ATF	0.15	0.18	18.5	0.15	0.18	18.5
Bitumen	0.16	0.15	-8.0	0.16	0.15	-8.0
FO/LSHS	0.12	0.13	12.3	0.12	0.13	12.3
Lubes+Greases	0.08	0.07	-6.2	0.08	0.07	-6.2
LDO	0.01	0.01	10.8	0.01	0.01	10.8
Sub Total	3.45	3.69	6.9	3.45	3.69	6.9
Sub - Total (A) + (B)	4.31	4.53	5.2	4.31	4.53	5.2
(C) Other Minor Decontrolled Products						
Pet.Coke	0.32	0.25	-22.8	0.32	0.25	-22.8
Others*	0.34	0.21	-39.4	0.34	0.21	-39.4
Sub Total	0.66	0.45	-31.4	0.66	0.45	-31.4
Total	4.97	4.99	0.4	4.97	4.99	0.4
*Others include sulfur, propylene, propane, reformat, L.A.B.F.S, CBFS, butane, MTO etc.						

Industry Domestic Consumption Trend in TMT Table-9)

Industry Consumption Trend Analysis 2023-24 (Provisional)											(0000 MT)	
Product	April					April					Growth(%)_2023 over 2022	
	FY2022-23	FY2023-24	Growth(%)_2023-24 over 2022-23	2019	2020	2021	2022	2023	Growth(%)_2023 over 2019	Growth(%)_2023 over 2020		Growth(%)_2023 over 2021
(A) Sensitive Products												
LPG	2157	2154	-0.2	1900	2113	2102	2157	2154	13.4	1.9	2.5	-0.2
SKO	72	30	-58.0	254	129	105	72	30	-88.1	-76.5	-71.2	-58.0
Sub Total	2230	2184	-2.0	2155	2242	2207	2230	2184	1.4	-2.6	-1.0	-2.0
(B) Major Decontrolled Product												
HSD	7199	7820	8.6	7324	3252	6676	7199	7820	6.77	140.46	17.1	8.6
MS	2797	2877	2.8	2459	973	2386	2797	2877	17.0	195.6	20.6	2.8
Naphtha	974	1083	11.3	966	730	1164	974	1083	12.1	48.4	-6.9	11.3
ATF	553	655	18.5	646	55	412	553	655	1.4	1086.7	59.0	18.5
Bitumen	801	737	-8.0	691	187	818	801	737	6.7	294.8	-9.9	-8.0
FO/LSHS	522	586	12.3	498	283	517	522	586	17.6	107.2	13.3	12.3
Lubes+Greases	318	299	-6.2	265	168	355	318	299	12.8	78.1	-16.0	-6.2
LDO	52	58	10.8	45	28	96	52	58	28.3	108.4	-39.8	10.8
Sub Total	13216	14114	6.8	12894	5675	12424	13216	14114	9.5	148.7	13.6	6.8
Sub - Total (A) + (B)	15445.9	16298.4	5.5	15048.2	7917.5	14631.4	15445.9	16298.4	8.3	105.9	11.4	5.5
(C) Other Minor Decontrolled Products												
Pet.Coke	1726	1333	-22.8	2254	775	797	1726	1333	-40.8	71.9	67.3	-22.8
Others*	1283	777	-39.4	1039	680	895	1283	777	-25.2	14.3	-13.1	-39.4
Sub Total	3009	2111	-29.9	3293	1456	1692	3009	2111	-35.9	45.0	24.7	-29.9
Total	18455	18409	-0.2	18341	9373	16323	18455	18409	0.4	96.4	12.8	-0.2

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



Petroleum Planning & Analysis Cell

Ministry of Petroleum & Natural Gas, Government of India

Har Kaam Desh Ke Naam

Petroleum Planning and Analysis Cell (PPAC)

Ministry of Petroleum & Natural Gas

2nd Floor, Core-8, SCOPE Complex

7, Lodhi Rd, Institutional Area,

New Delhi, 110003

<https://www.ppac.gov.in/index.aspx>

Twitter link of PPAC:

<https://twitter.com/PPACIndia>

Popular PPAC website now has an
App version.

Search and downloaded from play store
with the name “PPAC”

ONE MILLION HITS ON WEBSITE IN < 5 MONTHS & COUNTING

