

India Oil & Gas Retail Market Opportunity Outlook 2025

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Abstracts

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India's primary energy demand is going to rise sharply in at least next two decades due to its favorable conditions for economic progress – India economy is likely to cross US\$ 3 Trillion mark by 2020 from US\$ 2.1 Trillion now. Despite its ambitious push for renewable energy technologies, a major portion of India's future energy demand will be met by hydrocarbon based energy resources due to technical and commercial advantages. In order to cut down its carbon emissions intensity of GDP, India is now emphasizing more on oil and gas than high carbon-intensive coal based technologies. Between oil and gas, India's policy is focusing on greater usage of natural gas due to its low emission-intensity. All the segments of oil and gas sector is likely to grow at healthy rate due to massive investment potential including the downstream sector particularly marketing and retailing sector which is going to be biggest gainer.

India's recent policy reforms in oil and gas sector are going to impact all the segments viz. exploration, production, refining and retailing but due to the already favorable market conditions, retailing is likely to be emerge more attractive segment for investment. In last five years India has stopped regulating prices of all petroleum products except LPG and Kerosene and has open the market as per international crude oil price. Analyzing the domestic consumption and exports of the five major petroleum or gas based products – petrol, diesel, ATF, LPG and CNG suggest the increasing attractiveness of domestic market for these products. Hence quite naturally oil and gas companies in India are focusing more on domestic market than exports. Consumption of petrol – one of the most commonly used fuels in transport sector, has been growing at an annual growth rate of more than 10% in last three fiscal terms showing the reasons for decline in exports at more than 6% annual rate in the same period.

Consumption of diesel, another most important fuel for India's vast public transportation system has moderate growth rate of 7.5% year-on-year basis in last three fiscal terms. After decontrolling the difference between the retail prices of petrol and diesel has narrowed down. There are restrictions imposed on certain class of diesel vehicles due to environmental concerns. Hence the consumption of diesel still occupies the maximum share in consumption of all the petroleum products, had the lowest growth rate among major petroleum products. But with the rapid growth in economy and hence rising income level, India's automobile sector is also likely to grow rapidly. Therefore all the estimates show India's petrol demand is projected to grow twice the current level by 2025. On the other hand, despite relatively slow growth rate, India's diesel consumption is also going to rise till any considerable time. The prices of both the products being directly linked to international market, it is easy to get the cognizance of domestic market for the global investors.

LPG is still one of the price sensitive petroleum products in India and its price continues to be subsidized. But the way subsidies getting provided are much more rationalized and scope of subsidies has also been curtailed. Besides, a parallel market of LPG has evolved, controlled by private players to sell LPG cylinders at market rates for both domestic and non-domestic purposes. The recent trend in the policies indicates that within a decade or even less the scope of subsidies will be cut further.

ATF is another petroleum product having impact on Indian economy as aviation industry being totally dependent on it. It is first petroleum product for which pricing was deregulated more than a decade ago in 2002. Considering the growth in Indian aviation industry in last few years and sensing the bright future growth opportunity, some of the international oil and gas majors including BP energy have already entered into India's domestic ATF retail market and some others also have shown interest. India is projected to be third largest aviation market in world with three-fold increase in air passengers by 2025 thus pushing India's ATF demand two-fold. In order to take the opportunity of that huge market, ATF retail market will see more international oil and gas firms in the queue to invest in India.

India has specifically mentioned its growing focus on natural gas in the coming years by enhancing share of natural gas in primary energy consumption to more than 20% by 2025 from 10% now. Though most of the increased demand of natural gas will come from power and fertilizer industry, the use of CNG is very likely to go up considerably in next five years' time. As CNG is being considered as cleanest alternative among the hydrocarbon based fuels, transport sector in the coming years will see more growth in

CNG enabled vehicles than petrol and diesel ones. Compliances against running of diesel vehicles in many parts of the country also going to work in favour of CNG demand. In order to cater the rising demand of CNG, number of CNG filling stations in India is going to increase by more than four times in next five years. In addition to the existing companies in retailing of CNG, more investment is very likely in the coming years to cash in on the rising demand and limited number of existing players.

“India Oil & Gas Retail Market Opportunity Outlook 2025” Report Highlights:

India Oil & Gas Sector Overview

India Oil & Gas Sector Indicators

Petrol, CNG, LPG, Diesel & ATF Retail Market Scenario

Current & Future Consumption Trends

Pricing Analysis & Tax Structure

India Oil & Gas Regulatory & Policy Framework

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COMPANIES MENTIONED

Indian Oil Corporation Limited (IOCL), Oil and Natural & Corporation (ONGC), Oil India Limited, Cairn Energy India, GAIL India Limited, Petronet LNG, Reliance Industries Limited

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