



WLPGA 2019 ASIA LPG SUMMIT

LPG Infrastructure –
Domestic and Non-Domestic
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Flow of Presentation

- LPG Market 2018-19 and Distribution Mode
 - LPG Market Demand Projections
 - LPG Import Projections
 - LPG Import Infrastructure
 - Import Terminals- Operational
 - Import Terminals – Planned
 - LPG Pipeline Infrastructure – Operational
 - LPG Pipeline Infrastructure - Planned
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Challenges in increasing LPG Market

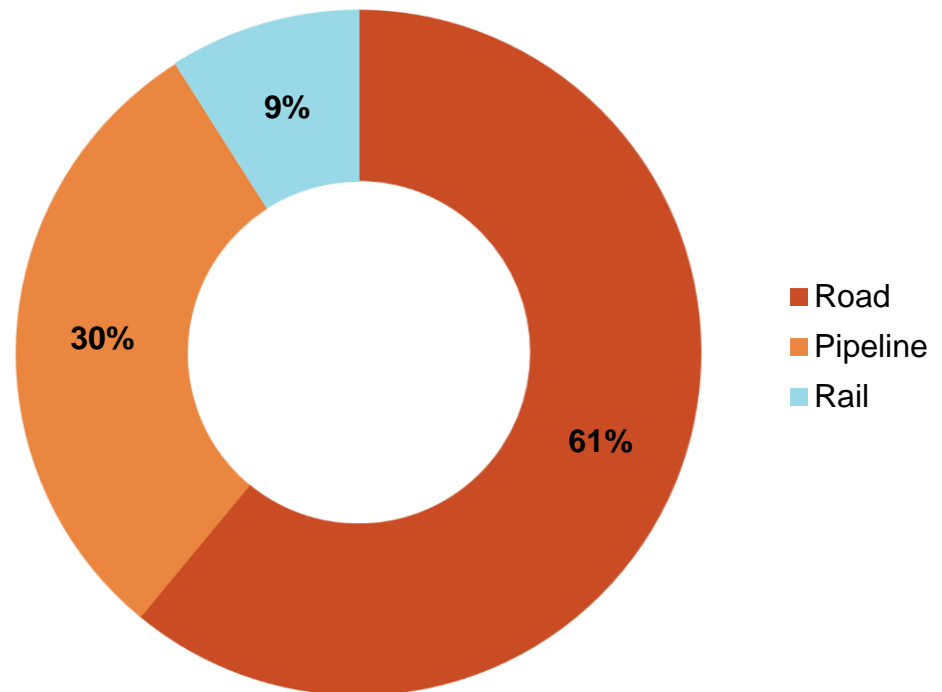
- Positioning at demand centres at optimum cost
- Easy availability of alternate fuels viz Natural gas, HSD, FO etc.



LPG Market 2018-19 and Distribution Mode

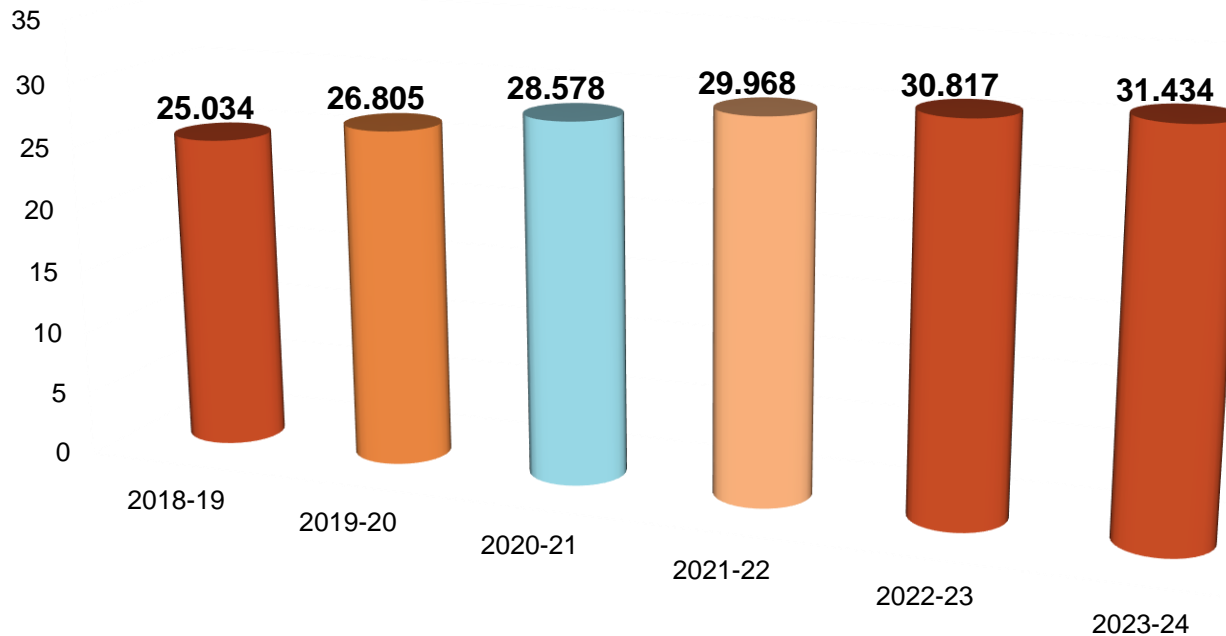
- 24 MMTPA
- More than 50% imported coastally

LPG Distribution Mode



LPG Market Demand Projections

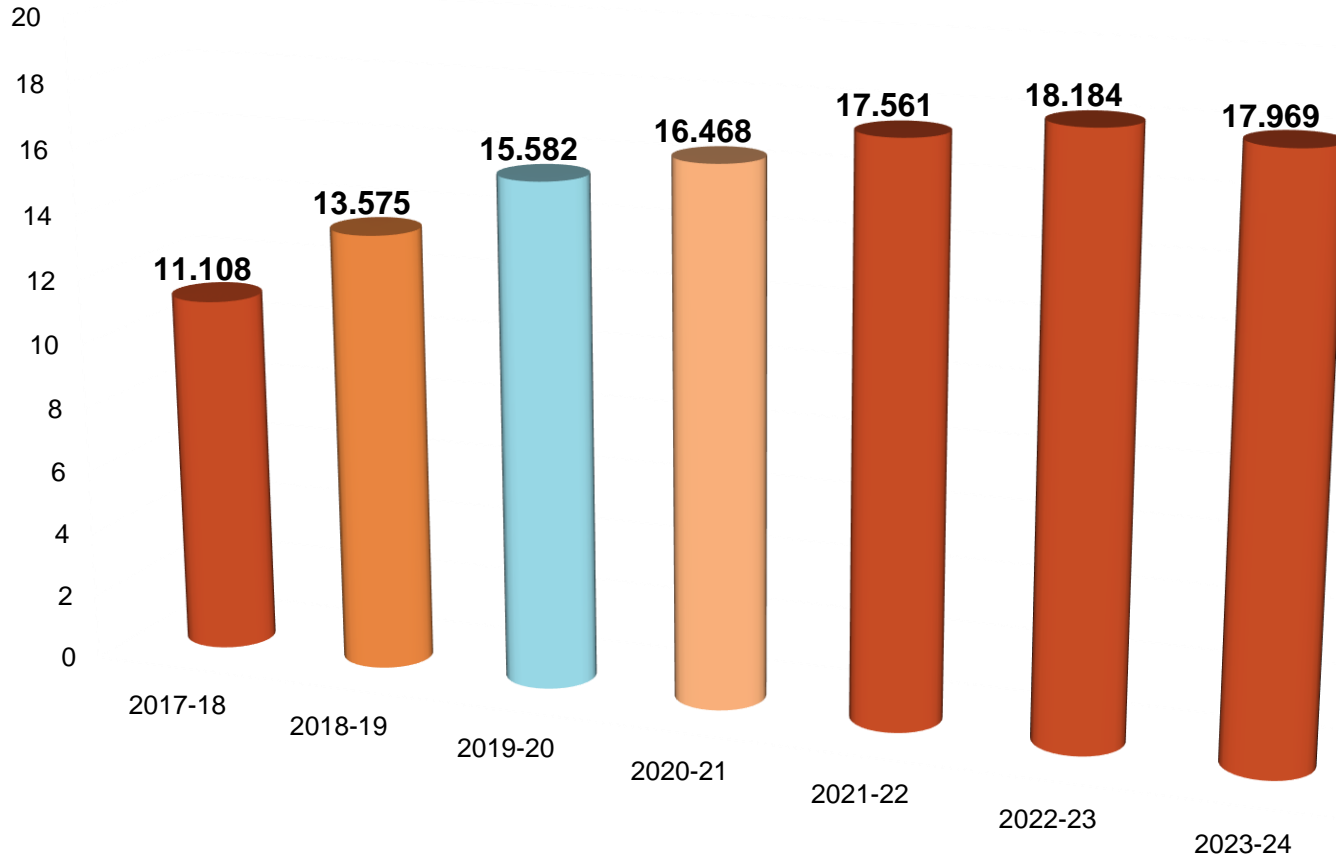
LPG Demand (MMT)




- 6% to 7% annual increase till 2020-21
- 2% annual increase after 2020-21

LPG Import Projections

LPG Sourcing (MMT)

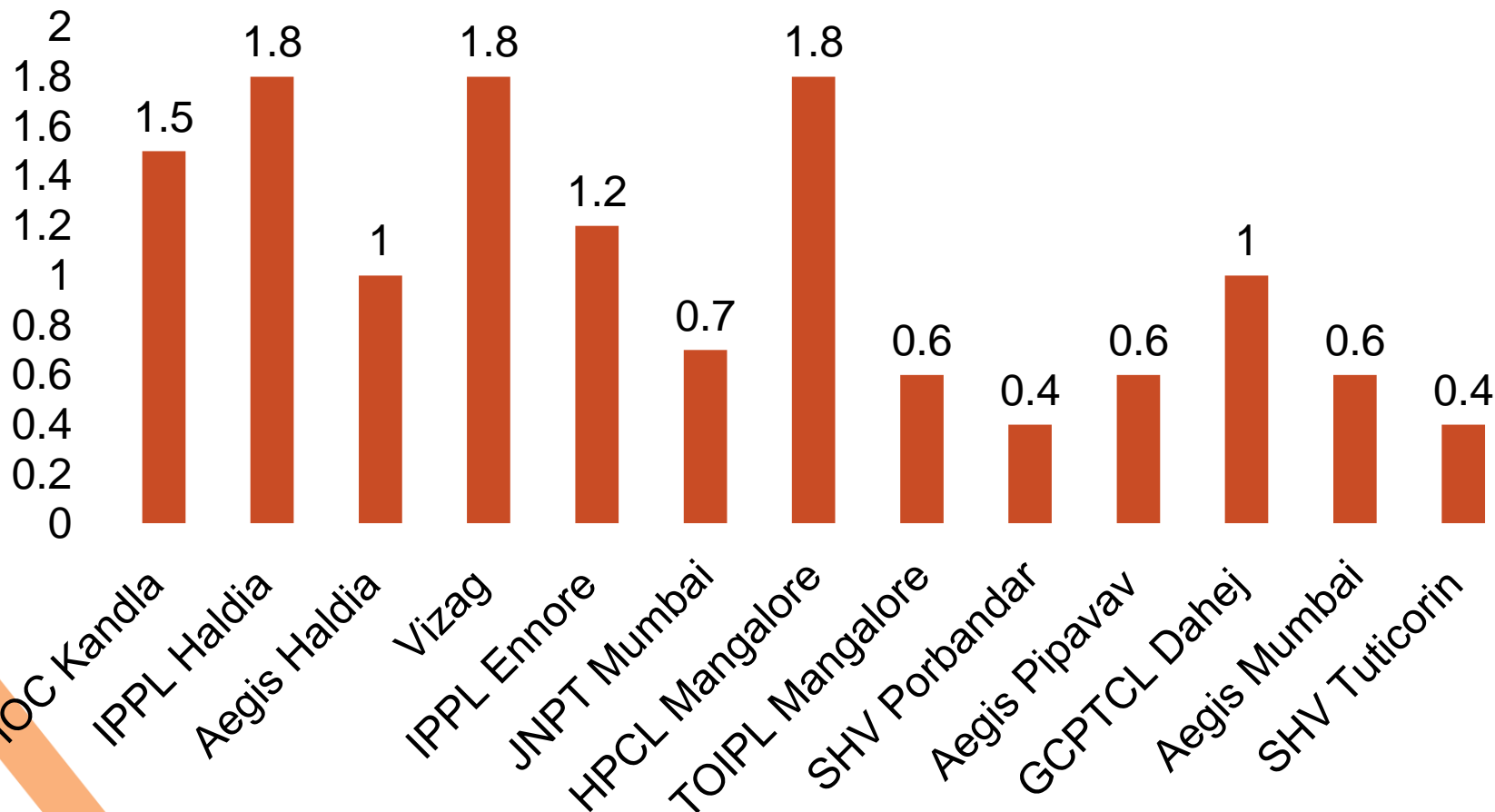


LPG Import Infrastructure

- Butane and Propane imported separately
 - Blended to meet the specifications at import terminals
 - 880 TMT storage capacity at import terminals
 - Small import terminals
 - No blending facility
 - Imported in form of Butane/LPG mix in small quantity
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Import Terminals- Operational

Capacity (MMTPA)



- Total Import Capacity – 13.4 MMTPA

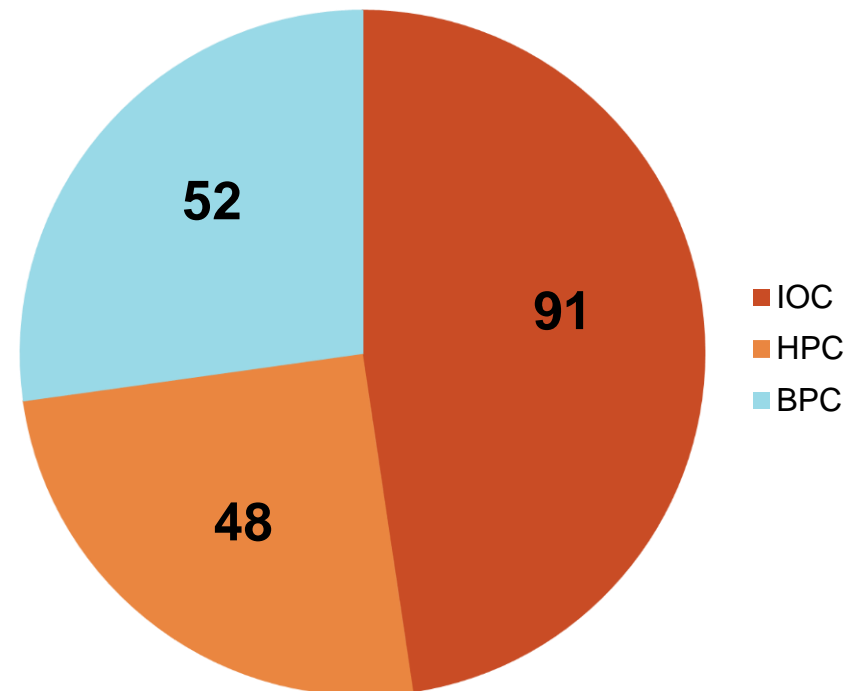
Import Terminals - Planned

Company	Port Name	Additional Capacity (MMTPA)	Planned Year of commissioning
IOC	Kochi	0.600	2020-21
IOC	Paradip	2.000	2021-22
IOC	Kandla - Augmentation	1.000	2022-23
BPC	Haldia	1.000	2019-20
Adani	Mundra	2.200	2019-20
TOTAL		6.800	

LPG Bottling Infrastructure - Operational

- Total Capacity – 17.558 MMTPA
- Individual Capacity – 11 TMTPA to 240 TMTPA
- Additionally, 145 Nos of BPs with total capacity of 400 TMTPA by private marketers

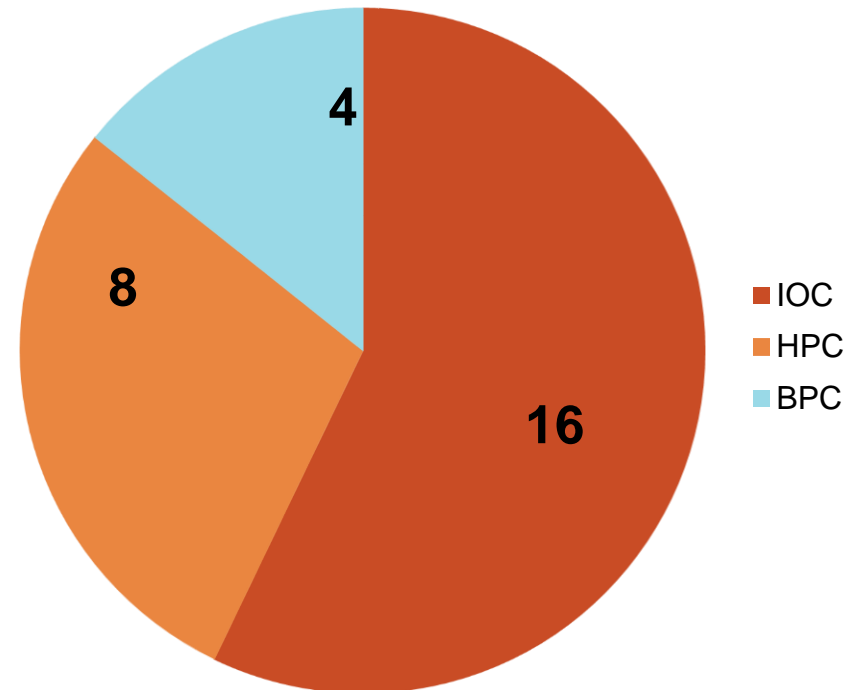
LPG Bottling Plant (Nos)



LPG Bottling Infrastructure - Planned

- Total Capacity – 2.5 MMTPA
- Operational by 2020-21

LPG Bottling Plant (Nos)



LPG Pipeline Infrastructure - Operational

S.No	Pipeline	Capacity (MMTPA)	Remarks
1	Jamnagar – Loni Pipeline (GAIL)	2.5	Augmentation to 3.5 MMTPA under progress
2	Vizag-Secunderabad Pipeline (GAIL)	1.13	
3	Panipat – Jalandhar Pipeline (IOCL)	0.7	
4	Mangalore – Hassan- Yedyur Pipeline (HPCL)	3.1	
5	Kochi-Salem Pipeline (JV: IOC and BPC)	1.28	Kochi Ref. to Kochi BP commissioned in 17-18
6	Paradip-Haldia-Durgapur Pipeline (PHDPL)	1.3	

LPG Pipeline Infrastructure - Planned

- **Extension of PHDPL to Patna and Muzaffarpur (IOCL):** Work under progress.
- **Ennore – Trichy – Madurai (IOCL) :** Work could not start due to non-availability of ROU in Tamil Nadu. However, M/s IMC Ltd. has recently submitted the Expression of Interest to PNGRB for this pipeline.
- **Kochi – Coimbatore – Erode – Salem Pipeline (KSPPL - a JV of IOC and BPC) :** The pipeline is under execution for the section Kochi-Palakkad.
- **Uran – Chakan pipeline (BPC and HPC) :** This pipeline connecting Mumbai based refineries of HPC and BPC and also the import terminal at JNPT Uran to bottling plants of IOC, BPC and HPC in Pune is under execution.
- **Mundra – Mithi Rohar (Kandla) pipeline :** Under construction by M/s Adani
- **Kandla – Gorakhpur pipeline :** Survey works under progress by JV (IOC, HPC, BPC)
- **Hassan – Cherlapally pipeline :** HPCL has submitted its Expression of Interest for extending its Mangalore – Hassan – Yediyur pipeline upto Cherlapally. PNGRB has invited the bids for this pipeline.

Thanks

