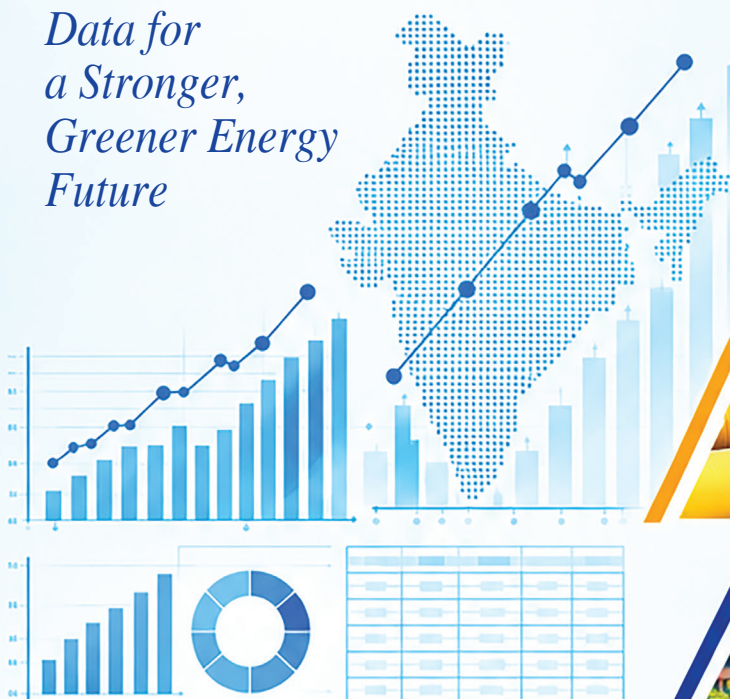




ANNUAL STATISTICAL REPORT 2025-26

*Data for
a Stronger,
Greener Energy
Future*





Annual **STATISTICAL REPORT** 2025-26

FOREWORD

The PNGRB Annual Statistical Report 2025–26 presents the evolving landscape of India's Petroleum and Natural Gas Sector through data, evidence and regulatory experience. It brings together diverse datasets, sectoral developments and key regulatory initiatives of the Petroleum and Natural Gas Regulatory Board (PNGRB), providing a coherent statistical perspective on the growth, performance and emerging dimensions.

The preparation of the Report has been a collective endeavour. Broad guidance and support were provided by the Principal Advisor (SP) towards structure of the report and integration of the material. Overall direction and data support was provided by HoD (Statistics). Statistics Division places on record its appreciation for the continued support of different Divisions of PNGRB for providing inputs for respective Chapters. The Division also acknowledges the dedicated contributions of all the officials of Statistics Division and others connected in preparation of this report including the compilation, examination, validation, reconciliation and analytical processing of data. The Report is, ultimately, a product of the collective efforts and professional commitment of the team.

The Report is intended not only as a statistical record of 2025–26 but also as a reference for understanding sectoral developments and PNGRB's regulatory journey. It is hoped that it will contribute to informed appreciation and evidence-based regulatory and policy discourse.

Considerable care has been taken to ensure accuracy and consistency of the data in this report. In case of any discrepancy, the relevant figure may kindly be cross-checked with the original source, which shall be treated as authoritative. Suggestions on the coverage, presentation and quality of the Report are sincerely welcomed for strengthening future editions.

New Delhi
28th September, 2026

Statistics Division
Petroleum and Natural Gas Regulatory Board (PNGRB)

EXECUTIVE SUMMARY

The PNGRB Annual Statistical Report 2025–26 presents a comprehensive statistical and analytical overview of India's downstream petroleum and natural gas sector, covering infrastructure expansion, operational performance, capacity utilization, safety oversight, emerging energy pathways, tariff reforms, and consumer protection across regulated entities.

India's energy sector continues to evolve through sustained infrastructure development, growing adoption of cleaner fuels, and policy emphasis on building a gas-based economy. Expansion of City Gas Distribution (CGD) networks, strengthening of the National Gas Grid, and augmentation of petroleum product pipeline infrastructure are together contributing to a more efficient, connected, and sustainable energy ecosystem.

Infrastructure Expansion

As on 31st March 2026, the CGD sector had expanded to 307 authorized Geographical Areas across 28 States and 6 Union Territories, covering 748 districts and 99% of the population. Domestic PNG connections reached 1.69 crore, with 1.07 crore billed connections, while 19.08 lakh new connections were added during the year. The CNG network grew to 8,916 stations following the addition of 849 stations during the year. Commercial and industrial PNG customers stood at 49,994 and 21,831 respectively, and total CGD gas sales for the year were 17,061 MMSCM.

The Natural Gas Pipeline (NGPL) network expanded to an authorized length of 34,803 Km, of which 27,905 Km (80%) was operational, with the balance under construction. The Petroleum & Petroleum Product Pipeline (PPPL) network reached an authorised length of 15,198 Km, of which 10,662 Km (70%) was operational. India's LNG infrastructure comprised 8 operational terminals with an aggregate regasification capacity of 53.5 MMTPA. Natural gas consumption during the year stood at 68,542 MMSCM, with import dependence of approximately 50%.

Operational Performance and Capacity Utilization

Despite significant infrastructure build-out, certain pipeline systems continued to operate below optimal utilization due to delayed downstream connectivity, uneven regional demand growth, and phased development. Several newly authorized GAs remain in early stages of network development, and lower household conversion rates in some regions point to the need for stronger consumer outreach and improved last-mile connectivity. The sector also witnessed growing emphasis on digitalization, SCADA-based monitoring, GIS mapping, and infrastructure integrity management.

Emerging Energy Pathways: Compressed Biogas and Hydrogen

Compressed Biogas (CBG) recorded a marked transition from capacity creation to market absorption during the year. CBG sales rose from 0.211 MMSCMD in April 2025 to 0.620 MMSCMD in March 2026, taking national blending to 0.998% against the first-year Blending Obligation of 1%. Of the 207 functional CBG plants, however, only 24 (11.6%) were connected to the pipeline network, underscoring pipeline connectivity as the principal challenge for the next phase of CBG integration, particularly as the obligation rises to 3%, 4%, and 5% over the following three years.

On hydrogen, PNGRB has operationalized six blending pilot projects across five locations — Indore, Kawas, Jorhat, Ahmedabad, and Gorakhpur — testing blending levels of 2–5% to build India-specific evidence on material compatibility, leakage behaviour, metering, and pipeline integrity.

Safety and Regulatory Developments

Safety and integrity management remained central to sustainable infrastructure growth. During FY 2025–26, PNGRB conducted 855 audits across the regulated sector, comprising 398 Technical Standards and Specifications (T4S) audits, 138 Integrity Management System (IMS) audits, and 319 Emergency Response and Disaster Management Plan (ERDMP) audits. During the same period, 72 incidents were reported, resulting in 38 fatalities and 22 injuries, with City Gas Distribution networks accounting for the highest share of incidents, consistent with the scale and density of that network. These findings continue to inform PNGRB's shift towards preventive, risk-based safety management.

Tariff Reforms

A significant structural reform was undertaken in the Unified Tariff (UFT) framework for natural gas pipelines, reducing the number of tariff zones from three to two with effect from July 2025, and it was revised further with Zone-1 at ₹54/MMBTU and Zone-2 at ₹102.86/MMBTU for January–March 2026. CNG and PNG-Domestic consumers were accorded Zone-1 tariff treatment irrespective of distance, a reform estimated to reduce CGD-sector transportation costs by approximately ₹1,000 crore annually, translating into an estimated reduction of ₹1.25–2.50 per kg for CNG and ₹0.90–1.80 per SCM for PNG-Domestic consumers.

Consumer Protection

Consumer grievance redressal continued to receive close regulatory attention. During the year, 19.36 lakh complaints were registered across the PNG and CNG segments, of which 59.05% were resolved overall. CNG complaints achieved a resolution rate of 89.8%, which is higher than the PNG resolution rate i.e. 58.6% , indicating scope for further improvement.

Way Forward

India's petroleum and natural gas sector is entering a phase of accelerated infrastructure expansion and market evolution. Going forward, improving infrastructure utilization, strengthening last-mile connectivity, accelerating CBG pipeline integration, advancing hydrogen blending readiness, reinforcing preventive safety management, and institutionalizing standardized data management practices will remain key priorities. This report is intended to serve as a reliable reference for policymakers, regulators, industry participants, researchers, and other stakeholders engaged with India's evolving energy ecosystem.

INTRODUCTION

The Petroleum and Natural Gas sector occupy a strategic position in India's economic development, energy security, industrial growth, and transition towards a cleaner and more sustainable energy future. Expansion of energy infrastructure, increasing accessibility of cleaner fuels, modernization of transportation systems, and strengthening of energy markets continue to play a critical role in supporting the country's developmental aspirations.

In recent years, India's energy landscape has undergone significant transformation driven by rapid urbanization, rising energy demand, industrial expansion, environmental considerations, and policy initiatives aimed at promoting a gas-based economy. Natural gas, being a comparatively cleaner fossil fuel, is increasingly being recognized as an important transition fuel capable of supporting economic growth while contributing towards reduction in carbon intensity and improvement in environmental sustainability.

The development of City Gas Distribution (CGD) networks, expansion of the National Gas Grid, augmentation of petroleum and petroleum product pipeline infrastructure, and integration of emerging energy pathways such as Hydrogen initiatives, compressed biogas (CBG), LNG transportation, and low-carbon fuel systems reflect the evolving structure of India's energy ecosystem. Simultaneously, increasing emphasis is being placed on operational safety, infrastructure integrity, digital monitoring systems, sustainability initiatives, and efficient resource utilization.

As the sector continues to expand in scale and complexity, the importance of reliable, standardized, and comprehensive statistical systems has increased substantially. Accurate and timely data is essential for evidence-based policymaking, regulatory oversight, infrastructure planning, market development, investment assessment, operational monitoring, and informed decision-making by stakeholders across the energy value chain.

Recognizing this need, the Petroleum and Natural Gas Regulatory Board (PNGRB) has undertaken sustained efforts towards strengthening institutional mechanisms for data collection, harmonization, validation, and dissemination of sectoral data across regulated entities. The consolidation of diverse reporting formats and development of an integrated data management framework represent important steps towards promoting transparency, consistency, and data-driven governance within the sector.

This Maiden Annual Statistical Report 2025–26 has been prepared with the objective of providing a comprehensive statistical and analytical overview of Regulatory interventions and related data information about activities in the purview of PNGRB. The report brings together key information relating to infrastructure development, operational performance, capacity utilization, consumer outreach, safety management, sustainability initiatives, tariff and regulatory developments, and emerging trends across CGD networks, natural gas pipelines, and petroleum product pipeline systems.

In addition to presenting statistical indicators, the report seeks to provide analytical insights into regional development patterns, infrastructure utilization challenges, operational efficiency, evolving market dynamics, and future growth opportunities. It also highlights emerging areas such as compressed biogas integration, and preparedness for future energy transition pathways.

This handy document as the first edition of this annual statistical publication would lay the foundation for development of a robust and standardized statistical reporting framework for the petroleum and natural gas sector in the years ahead.

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CHAPTER I

Prime Indicators at a Glance

1. City Gas Distribution (CGD)

Table 1.1: City Gas Distribution — Key Indicators

Indicator	As on 31.03.26
Geographical Areas (GAs) authorized	307
No. of States covered	28
No. of Union Territories covered	6
No. of Districts covered	748
Population coverage	99%
Domestic PNG connections	1.69 crore
Billed domestic PNG connections	1.07 crore
Billed / connected DPNG ratio	~63%
Commercial PNG customers	49,994
Industrial PNG customers	21,831
CNG stations	8,916
CGD pipeline (As per Targets assigned to GAs)	~3.22 lakh Inch-Km
PNG Domestic connections added during FY	19.08 lakh
CNG stations added during FY	849
Total PNG connections released during FY	19.14 lakh
Total CGD gas sales	17,061 MMSCM
PNG-D sales	~1,328 MMSCM
PNG-C sales	~350 MMSCM
PNG-I sales	~4,663 MMSCM
CNG sales	~10,721 MMSCM
<i>Data as submitted by entities</i>	

CGD PERFORMANCE:

Percentage Achievement against Pro-rata MWP Target:

DPNG — 41% | CNG Stations — 133% | Pipeline — 82%

2. Natural Gas — Key Indicators

Table 1.2: Natural Gas — Production, LNG Imports and Consumption

Indicator	FY 2025–26	FY 2024–25	Growth
Gross Natural gas production (MMSCM)	34,326	35,594	–3.56%
LNG imports (MMSCM)	34,216	35,720	–4.21%
Natural Gas consumption (MMSCM)	68,542	71,314	–3.89%

Import dependence is ~50% of Natural Gas consumption.

3. Natural Gas Pipelines (NGPL)

Table 1.3: Natural Gas Pipelines — Key Indicators

Indicator	As on 31.03.26
Authorised NGPL network	34,803 Km
Operational NGPL network	27,905 Km
Under-construction network	8,551 Km

As on 31.03.2026 operational NGPL network is 80.17 % of authorized NGPL network.

4. Petroleum & Petroleum Product Pipelines (PPPL)

Table 1.4: Petroleum & Petroleum Product Pipelines — Key Indicators

Indicator	As on 31.03.26
Authorised PPPL network	15,198 Km
Operational PPPL network	10,662 Km
Partially Commissioned and Under construction	4,114 Km

As on 31.03.2026 operational PPPL network is 70.15 % of authorised PPPL network.

5. LNG Terminals

Table 1.5: LNG Terminals — Key Indicators

Indicator	As on 31.03.26
Operational LNG terminals	8
Total regasification capacity (MMTPA)	53.5
LNG retail stations — PSU	13
LNG retail stations — Private	16

India had 8 operational LNG terminals with aggregate capacity of 53.5 MMTPA.

6. Tariff Reform

Table 1.6: Tariff Reform — Key Indicators

Indicator	2025–26
Unified Natural Gas Pipeline Tariff framework	Operational
Number of tariff zones	2
Zone-1 transportation tariff	₹54/MMBTU
Zone-2 transportation tariff	₹102.86/MMBTU
Major tariff orders issued/revised	UFT revision notified on 7 July 2025
Major tariff reforms during FY	- Reduction of UFT tariff zones from 3 to 2. - Revised Zone-2 applicable beyond 300 Km.

UFT tariff zones from 3 to 2.

7. Compressed Bio-Gas — CBG

Table 1.7: Compressed Bio-Gas — Key Indicators

Indicator	As on 31.03.26
Functional CBG plants	207
Already connected CBG plants to pipeline	24
CBG plants connectivity in progress	15
CBG plants connectivity proposal initiated	20

Only 11.6% of functional CBG plants are connected to a pipeline.

71.5% of functional plants had no pipeline connectivity planned at the time of reporting.

8. Hydrogen — Emerging Gas Infrastructure

Table 1.8: Hydrogen — Emerging Gas Infrastructure

Indicator	As on 31.03.26
Hydrogen blending pilots	6
Pilot locations	5
Blending levels tested	2–5%
Hydrogen transportation roadmap	Developed
Hydrogen standards/technical work	Under development

The five current PNGRB pilot locations are Indore, Kawas, Jorhat, Ahmedabad and Gorakhpur.

5 Hydrogen Blending Pilots | 2–5% H₂ Blending | Regulatory/Technical Framework Under Development.

9. Technical & Safety

Table 1.9: Technical & Safety — Key Indicators

Indicator	FY 2025–26
T4S regulatory frameworks in force	Multiple sector-specific regulations
CGD T4S audits	125
NGPL T4S audits	25
PPPL T4S audits	23
LNG T4S audits	7
Major incidents reported	72

PNGRB maintains separate T4S regulatory and audit frameworks for CGD, NGPL, PPPL, LNG and other petroleum installations.

10. Consumer Protection

Table 1.10: Consumer Protection — Key Indicators

Indicator	FY 2025–26
Consumer Satisfaction Survey (CSS) — GAs covered	92
Entities covered under CSS	31
Survey agencies empaneled	5

92 GAs covered under Consumer Satisfaction Survey (CSS)

11. PNGRB Data Bank & Information System

Table 1.11: PNGRB Data Bank & Information System

Indicator	FY 2025–26 / Position
Core regulatory data domains	Multiple sectoral domains
Monthly MIS streams	NGPL, PPPL, CGD & others
CGD MIS	Operational
NGPL MIS	Operational
PPPL MIS	Operational
Data formats under revised framework	48
PNGRB (Data Bank and information system) Regulations 2026	Notified on 02.09.2026

PNGRB Data Bank and information system notified on 02.09.2026.

12. One-Line PNGRB Sector Snapshot

THE NATURAL GAS STORY — 2025–26

307 GAs | 1.69 Cr DPNG Connections | 1.07 Cr Billed Connections | 8,916 CNG Stations | ~3.22 Lakh Inch-Km CGD Network | 27,905 Km Operational NGPL | 10,662 Km Operational PPPL | 8 LNG Terminals | 53.5 MMTPA LNG regasification Capacity | 68.5 BCM Natural Gas Consumption | ~50% Import Dependence | 6 Hydrogen Blending Pilots

Data Sources:

Data as submitted by entities

Petroleum Planning & Analysis Cell (PPAC), website

CHAPTER II

City Gas Distribution Network

1. City Gas Distribution: The Visible Face of India's Gas Economy

The City Gas Distribution (CGD) sector is a pivotal component of India's gas economy and the principal interface through which natural gas reaches households, transport, commercial establishments and industries. Through expanding PNG and CNG networks, the sector is driving wider adoption of natural gas and supporting a cleaner, more efficient energy mix. CGD thus represents the last-mile architecture of India's gas economy, converting network infrastructure into wider consumer access and usage.

During FY 2025–26, the sector continued to expand its geographical and consumer footprint across 307 operational Geographical Areas (GAs). This Chapter presents the sector's performance at both entity and GA levels, focusing on key indicators such as PNG connections, CNG stations and pipeline infrastructure, with comparisons over the preceding two years. The analysis highlights variations in performance across GAs and entities and provides a factual assessment of the CGD sector's progress in deepening the reach, adoption and visibility of natural gas across India.

Entity-Wise CGD - Authorized GAs at a glance as on 31.03.2026

Table 2.1: Entity-Wise CGD - Authorized GAs

S. No.	Authorized CGD Entity	Number of GAs
1	Aavantika Gas Limited	2
2	Adani Total Gas Limited	33
3	AGP CGD India Private Limited	3
4	AGP City Gas Private Limited	9
5	Assam Gas Company Limited	1
6	Bagpat Green Energy Private Limited	1
7	Bengal Gas Company Limited	1
8	Bhagyanagar Gas Limited	3
9	Bharat Petroleum Corporation Limited	26
10	Central UP Gas Limited	3
11	Charotar Gas Sahakari Mandali Limited	1
12	Consortium of BPCL & OIL India Ltd	1
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	1
14	Dholpur CGD Private Limited	1
15	East Coast Natural Gas Private Limited	1
16	GAIL (India) Limited	6
17	GAIL Gas Limited	16
18	Gasonet Services (HP) Limited	1
19	Gasonet Services (RJ) Limited	1
20	Gasonet Services (UK) Limited	2

S. No.	Authorized CGD Entity	Number of GAs
21	Goa Natural Gas Private Limited	1
22	Godavari Gas Private Limited	2
23	Green Gas Limited	4
24	Gujarat Gas Limited	27
25	Haridwar Natural Gas Limited	1
26	Haryana City Gas (KCE) Private Limited	1
27	Haryana City Gas Distribution (Bhiwadi) Limited	1
28	Haryana City Gas Distribution Limited	1
29	HCG (KCE) Private Limited	1
30	HCG Meghalaya Private Limited	1
31	HCG Nagpur Private Limited	1
32	HCG Raipur Private Limited	1
33	HCG Yanam Private Limited	1
34	Hindustan Petroleum Corporation Limited	14
35	HPOIL Gas Private Limited	3
36	IMC Limited	1
37	Indian Oil Corporation Limited	26
38	Indian Oil-Adani Gas Private Limited	19
39	Indraprastha Gas Limited	10
40	IRM Energy Private Limited	4
41	Jay Madhok Energy Private Limited led Consortium	2
42	Mahanagar Gas Limited	3
43	Maharashtra Natural Gas Limited	6
44	Megha City Gas Distribution Private Limited	22
45	Naveriya Gas Private Limited	1
46	North East Gas Distribution Company Limited	3
47	Purba Bharati Gas Private Limited	2
48	Rajasthan State Gas Limited	2
49	Sabarmati Gas Limited	2
50	Sholagasco Private Limited	1
51	Think Gas Begusarai Private Limited	1
52	Think Gas Bhopal Private Limited	2
53	Think Gas Ludhiana Private Limited	2
54	Torrent Gas Chennai Private Limited	1
55	Torrent Gas Jaipur Private Limited	1
56	Torrent Gas Limited	14
57	Tripura Natural Gas Company Limited	5
58	Unison Enviro Private Limited	3
59	Vadodara Gas Limited	1
Total		307

2. Comparative status of CGD Performance during FY 2023-24 to 2025-26

Table 2.2: PNG Domestic Connections and Billed Connections — March 2024 to March 2026 (Nos.)

PNG Domestic Connections (Nos.)			
Segment	As on March-2024	As on March-2025	As on March-2026
PNG D Connections	1,29,22,516	1,50,41,471	1,69,49,377
Billed Connections	84,66,221	94,80,349	1,07,25,930

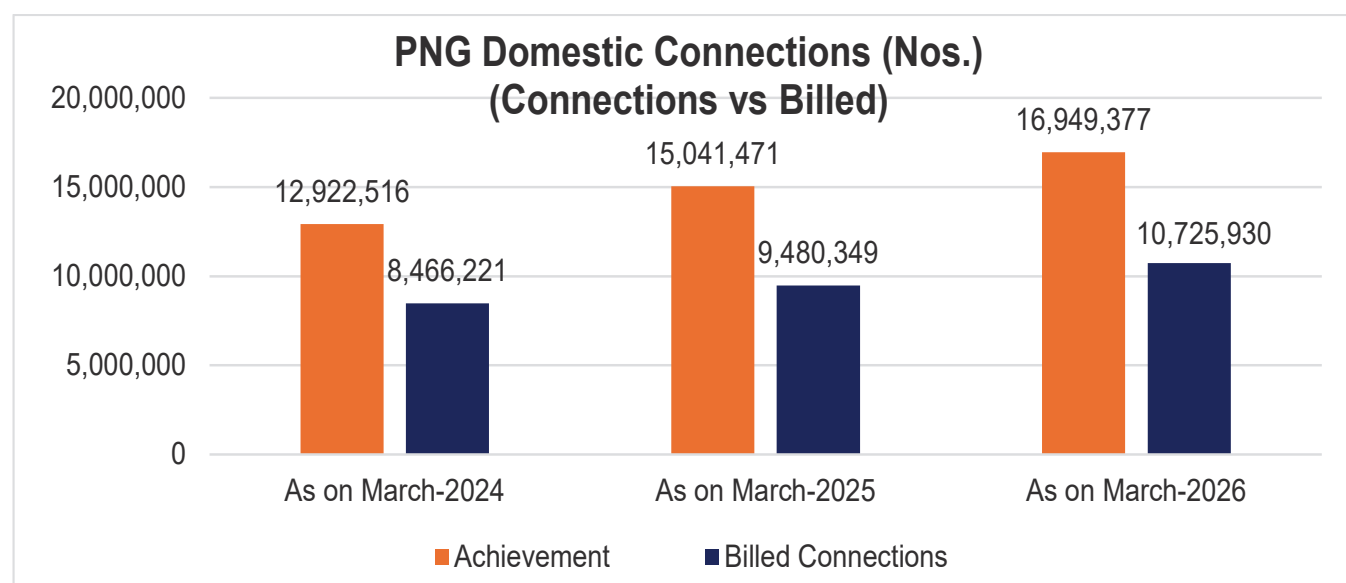


Table 2.3: CNG Stations — March 2024 to March 2026 (Nos.)

CNG Stations (Nos.)			
Segment	As on March-2024	As on March-2025	As on March-2026
CNG Stations (Achievement)	6,861	8,067	8,916

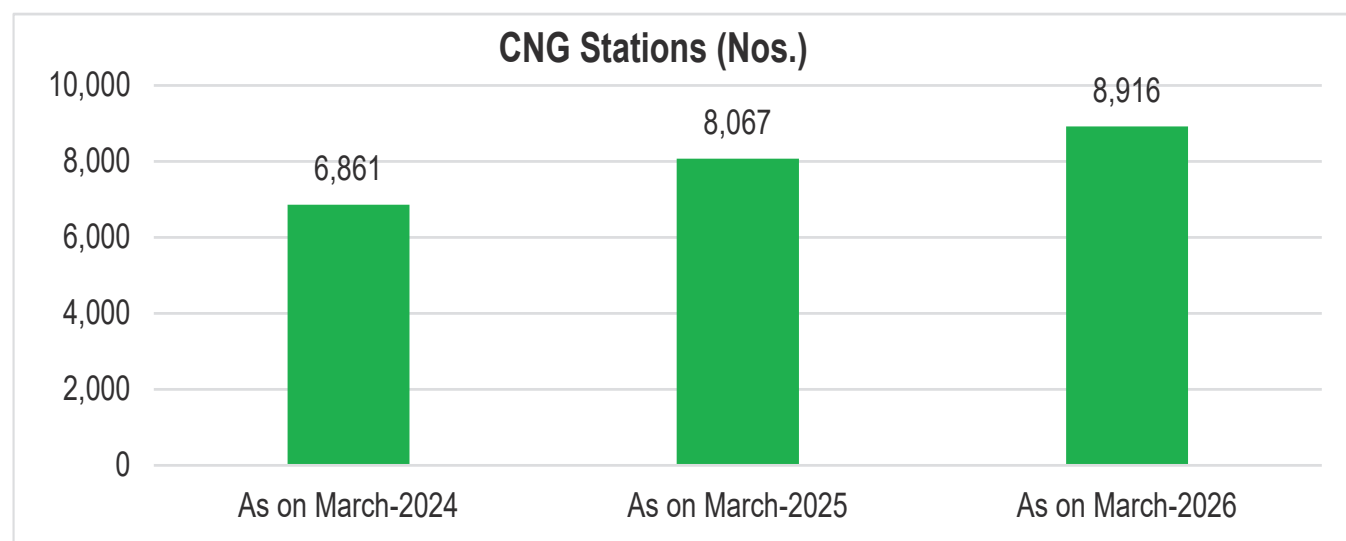
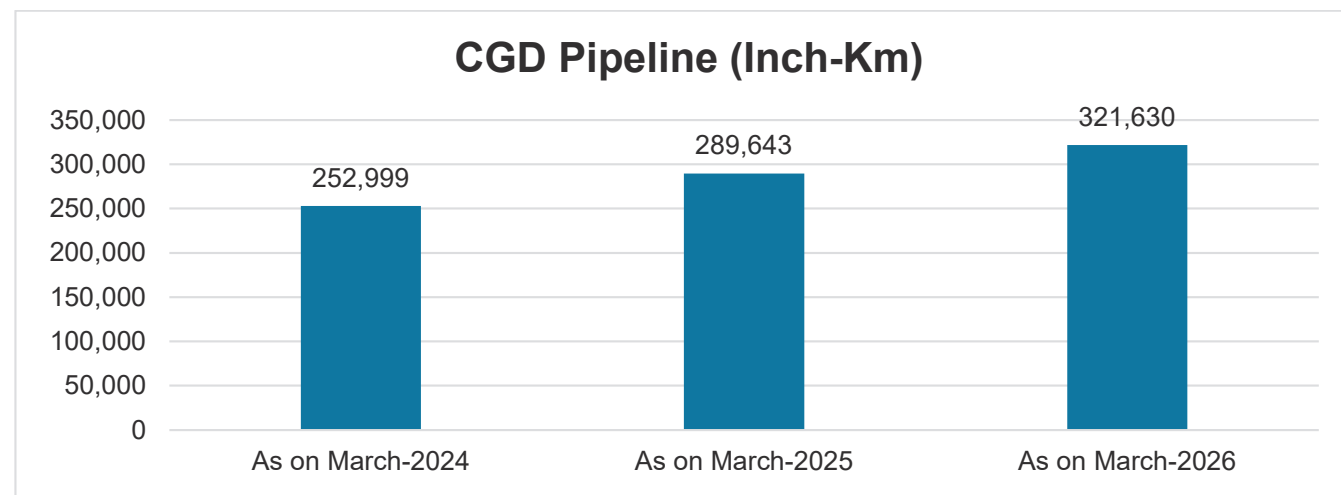


Table 2.4: CGD Pipelines — March 2024 to March 2026 (inch-Km)

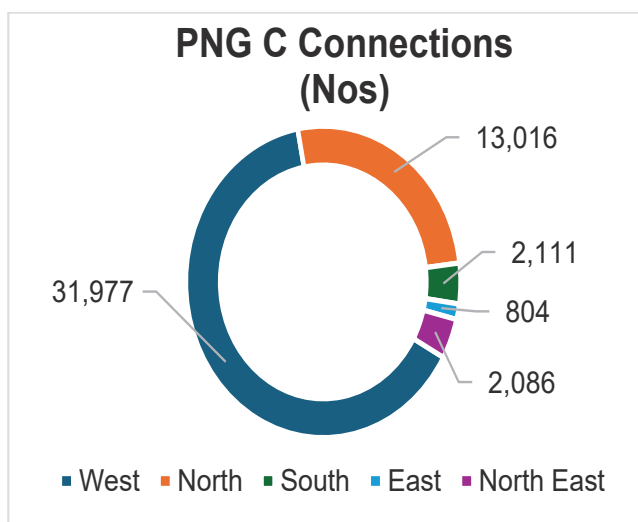
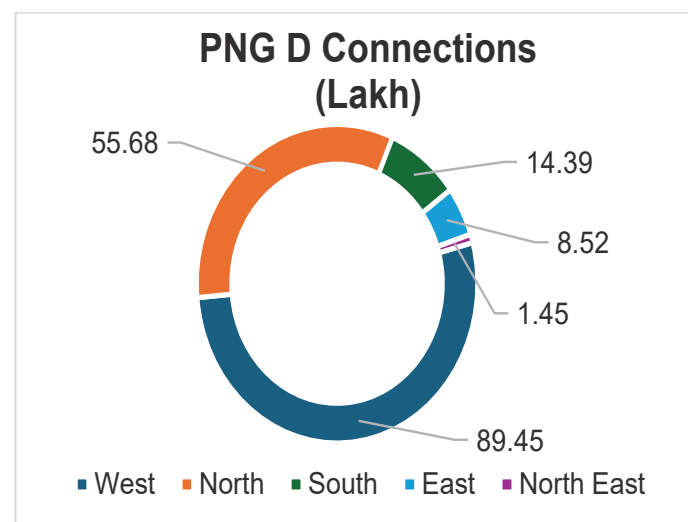
CGD Pipelines (Inch-Km)			
Segment	As on March-2024	As on March-2025	As on March-2026
Achievement (CGD Pipelines)	2,52,999	2,89,643	3,21,630

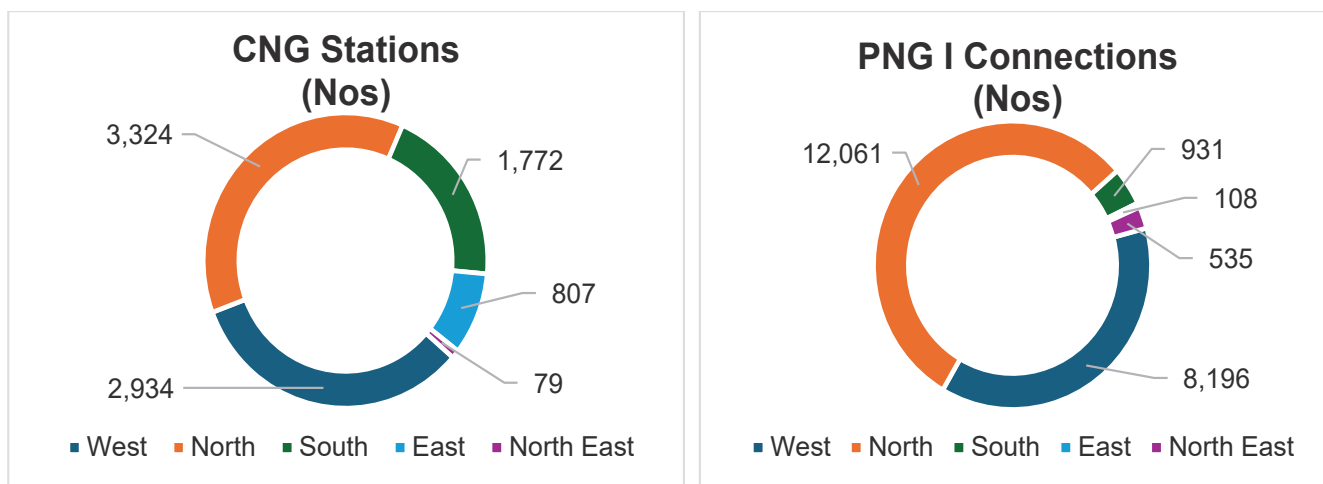


3. Region-wise Performance under CGD sector

Table 2.5: Region-wise PNG Connections and CNG Stations

Region	State/ UT (Nos)	PNG D Connection		PNG C Connection		PNG I Connection		CNG Station	
		Nos in Lakh	%	Nos	%	Nos	%	Nos	%
West	6	89.45	52.8%	31,977	64.0%	8,196	37.5%	2,934	32.9%
North	10	55.68	32.9%	13,016	26.0%	12,061	55.2%	3,324	37.3%
South	6	14.39	8.5%	2,111	4.2%	931	4.3%	1,772	19.9%
East	4	8.52	5.0%	804	1.6%	108	0.5%	807	9.1%
North-East	8	1.45	0.9%	2,086	4.2%	535	2.5%	79	0.9%
Total	34	169.49	100%	49,994	100%	21,831	100%	8,916	100%

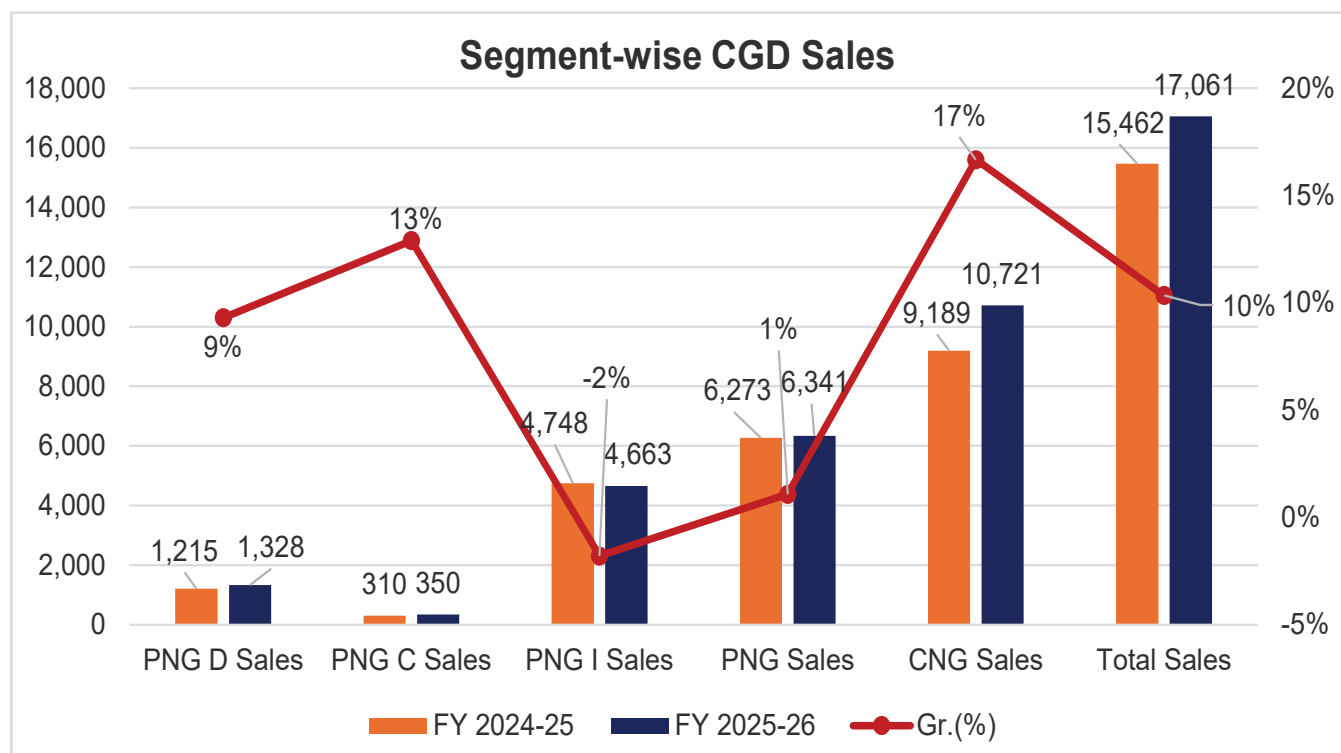




4. Segment-wise CGD sales

Table 2.6: Segment-wise CGD Sales: FY 2024-25 and FY 2025-26 (MMSCM)

Segment/Year	Unit	FY 2024-25	FY 2025-26	Gr. (%)
PNG D Sales	MMSCM	1,215	1,328	9%
PNG C Sales	MMSCM	310	350	13%
PNG I Sales	MMSCM	4,748	4,663	-2%
PNG Sales	MMSCM	6,273	6,341	1%
CNG Sales	MMSCM	9,189	10,721	17%
Total Sales	MMSCM	15,462	17,061	10%

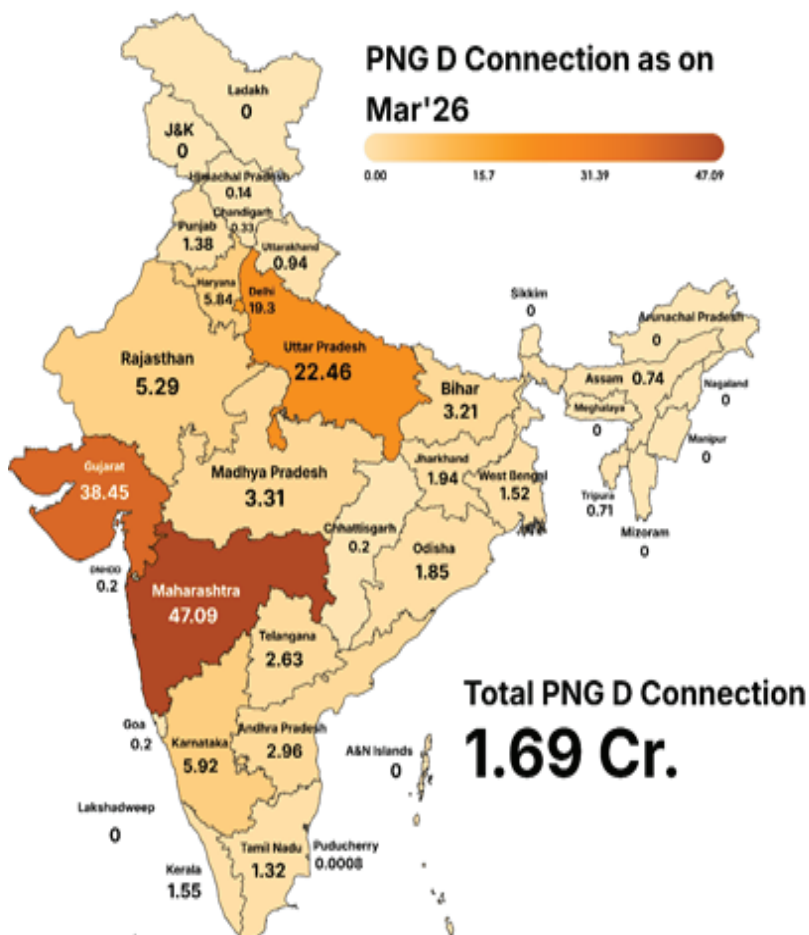


5. State-wise status of PNG D (Connections and Billed), PNG C, PNG I and CNG Station

The state-wise distribution of City Gas Distribution (CGD) infrastructure across India highlights significant regional concentrations, reflecting varying stages of network maturity and consumer adoption. A detailed analysis of Piped Natural Gas (PNG) and Compressed Natural Gas (CNG) data reveals that western and northern states, particularly Gujarat, Maharashtra, and Uttar Pradesh, lead the national transition toward a gas-based economy.

This section provides a comprehensive state-wise compilation of the City Gas Distribution (CGD) infrastructure rollout across the country. To offer a clear geographical perspective, the data is categorized by state and union territory, detailing the current status of Piped Natural Gas (PNG) and Compressed Natural Gas (CNG) installations. The subsequent tables outline the specific metrics for Domestic PNG (PNG-D), clearly distinguishing between the total number of connections provided and those actively being billed. Additionally, the data encapsulates the commercial (PNG-C) and industrial (PNG-I) consumer base, alongside the total number of operational CNG stations within each state.

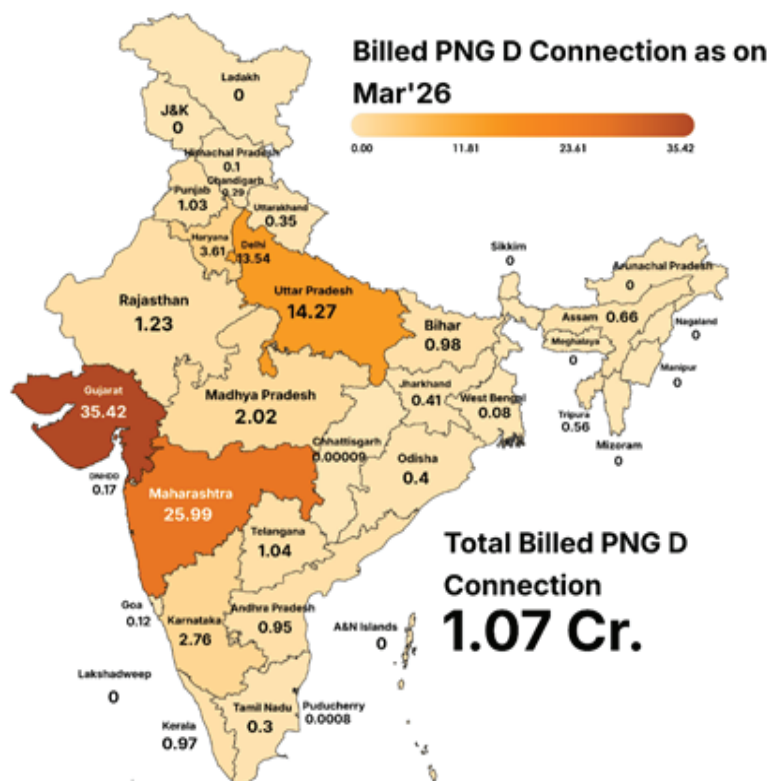
Map 2.1: State-wise PNG Domestic Connections as on March-2026



Key Insights – PNG Domestic Connections as on Mar'26

- **Maharashtra** has the highest PNG D connections at **47.09 lakh**, followed by **Gujarat (38.45 lakh)** and **Uttar Pradesh (22.46 lakh)**.
- The **top three States—Maharashtra, Gujarat and Uttar Pradesh—account for ~64%** of the total PNG D connections.
- **Delhi (19.30 lakh)** is the next major contributor, followed by **Karnataka (5.92 lakh)** and **Haryana (5.84 lakh)**.
- PNG D connections are **concentrated predominantly in western and northern States**, with relatively lower penetration across several eastern and northeastern States.

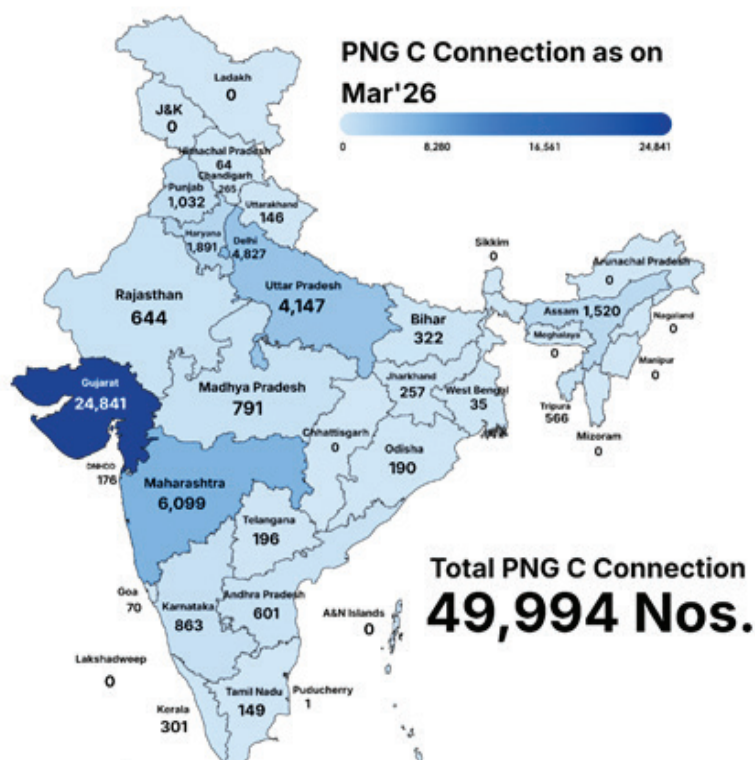
Map 2.2: State-wise PNG Billed Domestic Connections as on March-2026



Key Insights – Billed PNG D Connections as on Mar'26

- Gujarat has the highest billed PNG D connections at **35.42 lakh**, followed by **Maharashtra (25.99 lakh)** and **Uttar Pradesh (14.27 lakh)**.
- The **top three States—Gujarat, Maharashtra and Uttar Pradesh—**account for **~71%** of total billed PNG D connections.
- Delhi (13.54), Haryana (3.61 lakh)** and **Karnataka (2.76 lakh)** are the other major contributors.
- Billed PNG D connections are **highly concentrated in Gujarat, Maharashtra and Uttar Pradesh**, while several eastern and northeastern States have relatively low billed connections.

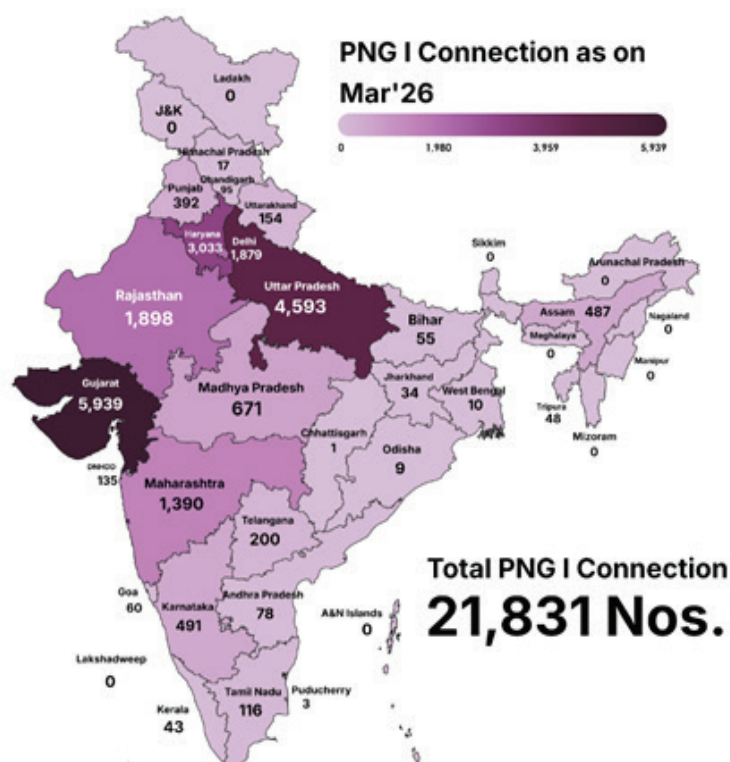
Map 2.3: State-wise PNG Commercial Connections as on March-2026



Key Insights – PNG C Connections as on Mar'26

- Gujarat has the highest PNG C connections at **24,841**, accounting for nearly **50%** of the national total.
- Maharashtra** ranks second with **6,099**, followed by **Delhi (4,827)** and **Uttar Pradesh (4,147)**.
- The **top four States account for ~80%** of total PNG C connections, indicating a high concentration of PNG C connections in these States.
- Among the remaining States, **Haryana (1,891)** and **Assam (1,520)** have relatively higher PNG C connections.

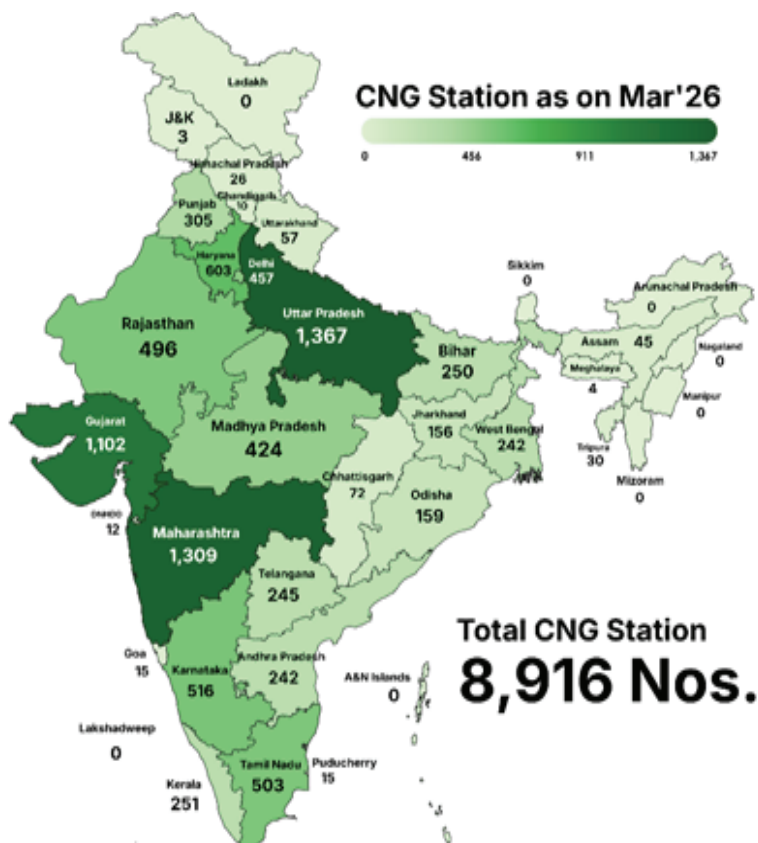
Map 2.4: State-wise PNG Industrial Connections as on March-2026



Key Insights – PNG I Connections as on Mar'26

- Gujarat has the highest PNG I connections at 5,939, followed by Uttar Pradesh (4,593), Haryana (3,033), Rajasthan (1,898) and Delhi (1,879).
- The top four States/UTs account for ~71% of the total PNG I connections.
- Gujarat and Uttar Pradesh together contribute ~48% of the total PNG I connections.

Map 2.5: State-wise CNG Stations as on March-2026



Key Insights – CNG Stations as on Mar'26

- Uttar Pradesh has the highest number of CNG stations at 1,367, followed by Maharashtra (1,309), Gujarat (1,102) and Haryana (603).
- The top four States collectively account for ~49% of the total CNG stations.
- Uttar Pradesh, Maharashtra and Gujarat together account for ~42% of the total CNG stations.
- Karnataka (516), Tamil Nadu (503) and Rajasthan (496) are the other major contributors.

6. Methodology for Performance Assessment of CGD GAs

Performance of CGD Geographical Areas (GAs) has been assessed against their Pro-rata Minimum Work Programme (MWP) targets for three key metrics i.e. DPNG connections, CNG Stations and CGD Pipeline (Inch-Km). GAs for which a target is not applicable/had not been assigned have been excluded from the respective Score calculation. GAs with no targets includes NA as well as Zero target indicated against particular metric.

Based on the percentage achievement against the Pro-rata MWP target, GAs have been graded as follows:

Achievement	Grade
≥ 100%	A
≥ 50% and < 100%	B
≥ 20% and < 50%	C
< 20%	D

a) Metric-wise Entity Score

For each Entity and for each of the three metrics i.e. DPNG Connections, CNG Stations and Pipeline—the GAs with MWP targets is first graded **A, B, C or D** based on achievement against their Pro-rata MWP target.

The grades are assigned weights:

Grade	Achievement	Weightage
A	≥100%	4
B	≥50% to <100%	3
C	≥20% to <50%	2
D	<20%	1

GAs without an applicable/assigned target are excluded from the calculation for that metric.

The resulting score for an Entity for each metric is then calculated as the average score of all GAs with MWP targets and termed as Average Performance Score (APS).

Thus, each APS lies between 1 and 4.

For example, if an Entity has 10 GAs with MWP targets for DPNG and their aggregate grade scores are 32:

This means that, on average, the Entity's GAs with MWP targets performed at a level corresponding to a score of 3.20 on the four-point grading scale.

b) Overall Entity Performance Score

The simple average of the three metric-wise (DPNG, CNG and Pipelines) APS values has been taken to compute Combined CGD Performance Score (CCPS).

Example

Suppose an Entity has:

Metric	Performance Score
DPNG Connections (APS)	3.20
CNG Stations (APS)	2.80
Pipeline (APS)	3.40
Combined CGD Performance Score (CCPS)	3.13

GA level

Achievement % → Grade (A/B/C/D) → Score (4/3/2/1)

Entity level – overall

DPNG APS + CNG APS + Pipeline APS → Combined CGD Performance Score (CCPS)

Note: Wherever comparative performance of CGD sector is shown the same assessment criteria has been followed for years preceding to FY 2025-26. While grading the GAs the pro rata targets have not been rounded off.

7. Performance Grading of GAs (DPNG Connections, CNG Stations and Pipelines)

To provide a structured overview of infrastructure progress across various Geographical Areas (GAs), a new performance grading format is introduced in this section. This categorization organizes the reported data to reflect the current development status of City Gas Distribution (CGD) networks, focusing specifically on Domestic Piped Natural Gas (DPNG) connections, the establishment of CNG stations, and the laying of pipelines. The subsequent tables and charts present this data by grouping the GAs based on their quantitative achievements for these specific infrastructure components.

Table 2.7: Distribution of GAs as per Performance Grading (DPNG Connections)

Classification of CGD GAs on 31.03.2026								
S. No.	Authorized CGD Entity	DPNG Connections (No.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
1	Aavantika Gas Limited	0	2	0	0	0	2	4.00
2	Adani Total Gas Limited	0	1	2	1	29	33	1.24
3	AGP CGD India Private Limited	0	0	0	2	1	3	1.67
4	AGP City Gas Private Limited	0	0	0	0	9	9	1.00
5	Assam Gas Company Limited	1	0	0	0	0	1	-
6	Bagpat Green Energy Private Limited	0	0	1	0	0	1	3.00
7	Bengal Gas Company Limited	0	0	0	0	1	1	1.00
8	Bhagyanagar Gas Limited	0	1	2	0	0	3	3.33
9	Bharat Petroleum Corporation Limited	0	13	4	4	5	26	2.96
10	Central UP Gas Limited	0	3	0	0	0	3	4.00
11	Charotar Gas Sahakari Mandali Limited	1	0	0	0	0	1	-
12	Consortium of BPCL & OIL India Ltd	0	0	0	0	1	1	1.00
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	0	0	0	0	1	1	1.00
14	Dholpur CGD Private Limited	0	0	0	1	0	1	2.00
15	East Coast Natural Gas Private Limited	0	0	0	0	1	1	1.00
16	GAIL (India) Limited	0	6	0	0	0	6	4.00

Classification of CGD GASs on 31.03.2026								
S. No.	Authorized CGD Entity	DPNG Connections (No.)						
		Performance Grading of GASs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
17	GAIL Gas Limited	0	3	5	5	3	16	2.50
18	Gasonet Services (HP) Limited	0	0	0	0	1	1	1.00
19	Gasonet Services (RJ) Limited	0	0	0	0	1	1	1.00
20	Gasonet Services (UK) Limited	0	0	0	0	2	2	1.00
21	Goa Natural Gas Private Limited	0	1	0	0	0	1	4.00
22	Godavari Gas Private Limited	0	0	2	0	0	2	3.00
23	Green Gas Limited	0	2	0	2	0	4	3.00
24	Gujarat Gas Limited	0	15	2	1	9	27	2.85
25	Haridwar Natural Gas Limited	0	1	0	0	0	1	4.00
26	Haryana City Gas (KCE) Private Limited	0	0	0	0	1	1	1.00
27	Haryana City Gas Distribution (Bhiwadi) Limited	0	0	0	1	0	1	2.00
28	Haryana City Gas Distribution Limited	0	0	0	1	0	1	2.00
29	HCG (KCE) Private Limited	0	0	0	0	1	1	1.00
30	HCG Meghalaya Private Limited	1	0	0	0	0	1	-
31	HCG Nagpur Private Limited	0	0	0	0	1	1	1.00
32	HCG Raipur Private Limited	0	0	0	0	1	1	1.00
33	HCG Yanam Private Limited	0	0	0	0	1	1	1.00
34	Hindustan Petroleum Corporation Limited	0	0	1	4	9	14	1.43
35	HPOIL Gas Private Limited	0	2	0	0	1	3	3.00
36	IMC Limited	0	1	0	0	0	1	4.00
37	Indian Oil Corporation Limited	1	2	9	2	12	26	2.04
38	Indian Oil-Adani Gas Private Limited	0	7	0	3	9	19	2.26
39	Indraprastha Gas Limited	0	8	2	0	0	10	3.80
40	IRM Energy Private Limited	0	2	0	1	1	4	2.75
41	Jay Madhok Energy Private Limited led Consortium	0	0	0	0	2	2	1.00
42	Mahanagar Gas Limited	0	3	0	0	0	3	4.00
43	Maharashtra Natural Gas Limited	0	2	2	0	2	6	2.67
44	Megha City Gas Distribution Private Limited	1	1	2	0	18	22	1.33
45	Naveriya Gas Private Limited	0	1	0	0	0	1	4.00
46	North East Gas Distribution Company Limited	0	0	0	0	3	3	1.00
47	Purba Bharati Gas Private Limited	0	0	0	0	2	2	1.00
48	Rajasthan State Gas Limited	0	0	1	0	1	2	2.00
49	Sabarmati Gas Limited	0	2	0	0	0	2	4.00
50	Sholagasco Private Limited	0	0	0	0	1	1	1.00
51	Think Gas Begusarai Private Limited	0	0	0	0	1	1	1.00

Classification of CGD GAs on 31.03.2026

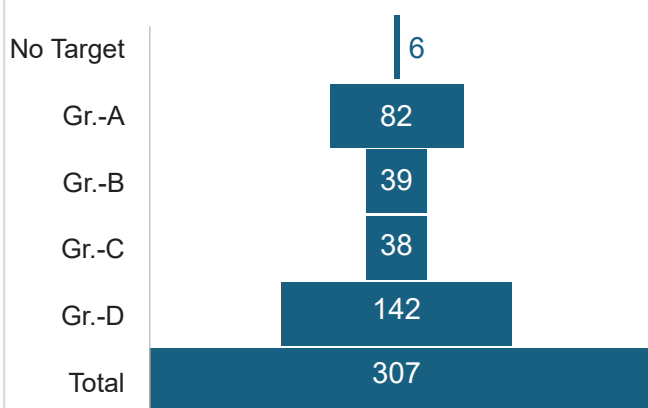
S. No.	Authorized CGD Entity	DPNG Connections (No.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
52	Think Gas Bhopal Private Limited	0	0	0	1	1	2	1.50
53	Think Gas Ludhiana Private Limited	0	0	0	0	2	2	1.00
54	Torrent Gas Chennai Private Limited	0	0	0	0	1	1	1.00
55	Torrent Gas Jaipur Private Limited	0	0	0	0	1	1	1.00
56	Torrent Gas Limited	0	0	2	8	4	14	1.86
57	Tripura Natural Gas Company Limited	1	1	0	1	2	5	2.00
58	Unison Enviro Private Limited	0	2	1	0	0	3	3.67
59	Vadodara Gas Limited	0	0	1	0	0	1	3.00
Total		6	82	39	38	142	307	

Grouping on the basis of Achievement w.r.t Prorata Target:

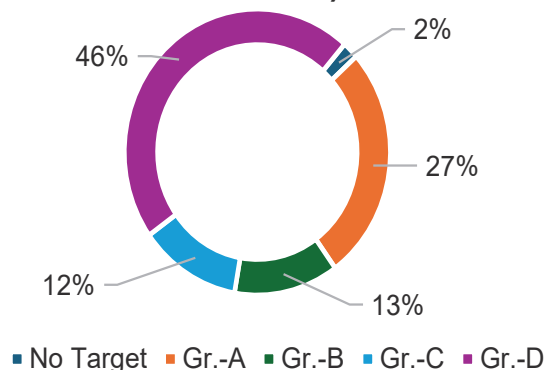
Gr.-A: $\geq 100\%$, Gr.-B: $\geq 50\%$ and $< 100\%$, Gr.-C: $\geq 20\%$ and $< 50\%$ & Gr.-D: $< 20\%$

* APS has been calculated only in respect of GAs. with MWP targets.

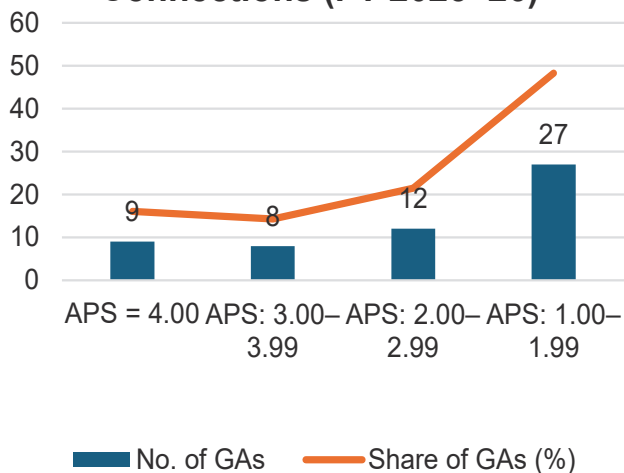
Grade Distribution - DPNG Connections (FY 2025-26)



Share of GAs by Grade — DPNG Connections (FY 2025-26)



APS Distribution — DPNG Connections (FY 2025-26)



Share of GAs by APS Band — DPNG Connections (FY 2025-26)

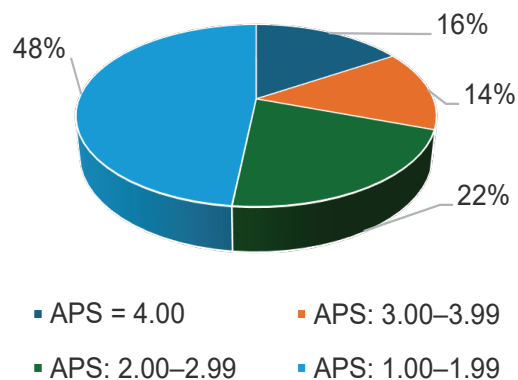


Table 2.8: Distribution of GAs as per Performance Grading (CNG Stations)

Classification of CGD GAs on 31.03.2026								
S. No.	Authorized CGD Entity	CNG Stations (No.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
1	Aavantika Gas Limited	2	0	0	0	0	2	-
2	Adani Total Gas Limited	4	16	9	4	0	33	3.41
3	AGP CGD India Private Limited	0	3	0	0	0	3	4.00
4	AGP City Gas Private Limited	0	0	1	8	0	9	2.11
5	Assam Gas Company Limited	1	0	0	0	0	1	-
6	Bagpat Green Energy Private Limited	1	0	0	0	0	1	-
7	Bengal Gas Company Limited	1	0	0	0	0	1	-
8	Bhagyanagar Gas Limited	2	1	0	0	0	3	4.00
9	Bharat Petroleum Corporation Limited	4	18	3	0	1	26	3.73
10	Central UP Gas Limited	3	0	0	0	0	3	-
11	Charotar Gas Sahakari Mandali Limited	1	0	0	0	0	1	-
12	Consortium of BPCL & OIL India Ltd	0	0	0	0	1	1	1.00
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	0	0	0	1	0	1	2.00
14	Dholpur CGD Private Limited	0	0	1	0	0	1	3.00
15	East Coast Natural Gas Private Limited	0	0	0	0	1	1	1.00
16	GAIL (India) Limited	6	0	0	0	0	6	-
17	GAIL Gas Limited	2	7	6	0	1	16	3.36
18	Gasonet Services (HP) Limited	0	0	0	1	0	1	2.00
19	Gasonet Services (RJ) Limited	0	0	0	1	0	1	2.00
20	Gasonet Services (UK) Limited	0	0	0	0	2	2	1.00
21	Goa Natural Gas Private Limited	1	0	0	0	0	1	-
22	Godavari Gas Private Limited	2	0	0	0	0	2	-
23	Green Gas Limited	2	2	0	0	0	4	4.00
24	Gujarat Gas Limited	20	4	3	0	0	27	3.57
25	Haridwar Natural Gas Limited	1	0	0	0	0	1	-
26	Haryana City Gas (KCE) Private Limited	0	1	0	0	0	1	4.00
27	Haryana City Gas Distribution (Bhiwadi) Limited	1	0	0	0	0	1	-

Classification of CGD GAs on 31.03.2026

S. No.	Authorized CGD Entity	CNG Stations (No.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
28	Haryana City Gas Distribution Limited	1	0	0	0	0	1	-
29	HCG (KCE) Private Limited	0	1	0	0	0	1	4.00
30	HCG Meghalaya Private Limited	1	0	0	0	0	1	-
31	HCG Nagpur Private Limited	0	0	1	0	0	1	3.00
32	HCG Raipur Private Limited	0	0	0	0	1	1	1.00
33	HCG Yanam Private Limited	0	0	0	1	0	1	2.00
34	Hindustan Petroleum Corporation Limited	0	6	6	1	1	14	3.21
35	HPOIL Gas Private Limited	2	0	0	0	1	3	1.00
36	IMC Limited	1	0	0	0	0	1	-
37	Indian Oil Corporation Limited	1	7	7	10	1	26	2.80
38	Indian Oil-Adani Gas Private Limited	9	2	8	0	0	19	3.20
39	Indraprastha Gas Limited	5	2	2	1	0	10	3.20
40	IRM Energy Private Limited	2	1	1	0	0	4	3.50
41	Jay Madhok Energy Private Limited led Consortium	2	0	0	0	0	2	-
42	Mahanagar Gas Limited	3	0	0	0	0	3	-
43	Maharashtra Natural Gas Limited	1	5	0	0	0	6	4.00
44	Megha City Gas Distribution Private Limited	4	4	2	7	5	22	2.28
45	Naveriya Gas Private Limited	1	0	0	0	0	1	-
46	North East Gas Distribution Company Limited	0	0	0	0	3	3	1.00
47	Purba Bharati Gas Private Limited	0	0	0	2	0	2	2.00
48	Rajasthan State Gas Limited	0	1	1	0	0	2	3.50
49	Sabarmati Gas Limited	2	0	0	0	0	2	-
50	Sholagasco Private Limited	0	0	0	0	1	1	1.00
51	Think Gas Begusarai Private Limited	0	0	1	0	0	1	3.00
52	Think Gas Bhopal Private Limited	0	0	2	0	0	2	3.00
53	Think Gas Ludhiana Private Limited	0	1	1	0	0	2	3.50
54	Torrent Gas Chennai Private Limited	0	0	1	0	0	1	3.00
55	Torrent Gas Jaipur Private Limited	0	1	0	0	0	1	4.00

Classification of CGD GAs on 31.03.2026

S. No.	Authorized CGD Entity	CNG Stations (No.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
56	Torrent Gas Limited	2	9	2	1	0	14	3.67
57	Tripura Natural Gas Company Limited	1	2	0	0	2	5	2.50
58	Unison Enviro Private Limited	1	1	1	0	0	3	3.50
59	Vadodara Gas Limited	1	0	0	0	0	1	-
Total		94	95	59	38	21	307	

Grouping on the basis of Achievement w.r.t Prorata Target:

Gr.-A: $\geq 100\%$, Gr.-B: $\geq 50\%$ and $< 100\%$, Gr.-C: $\geq 20\%$ and $< 50\%$ & Gr.-D: $< 20\%$

* APS has been calculated only in respect of GAs. with MWP targets.

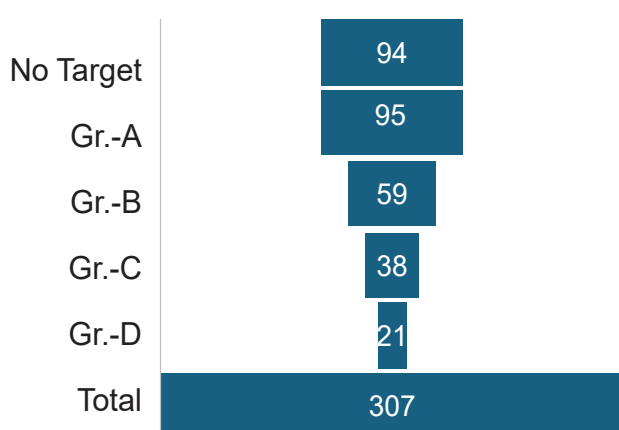
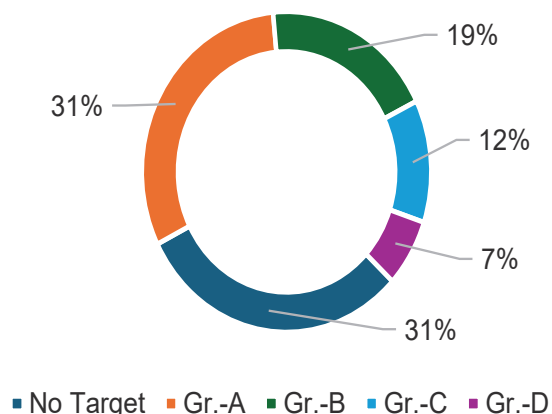
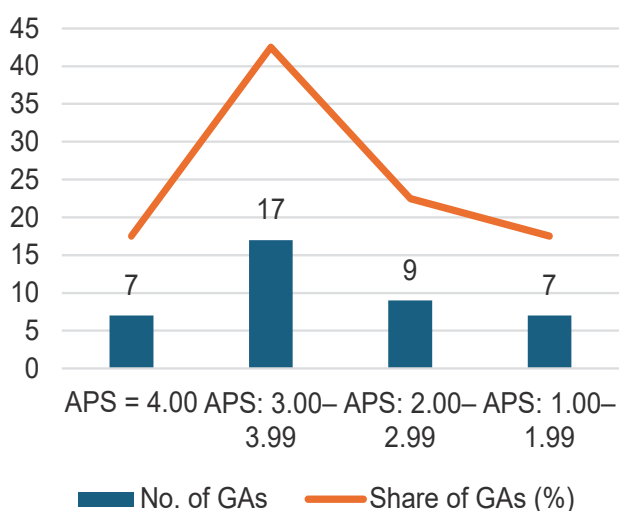
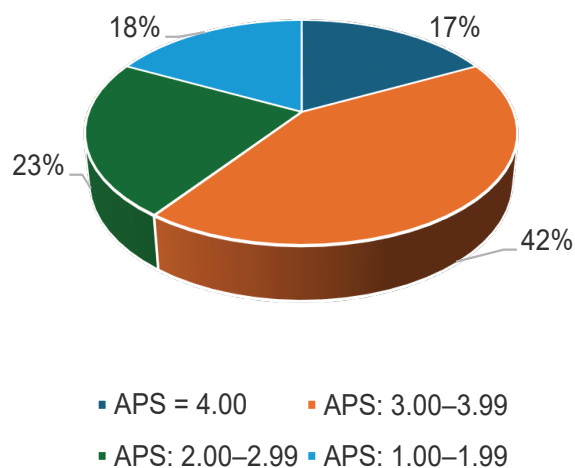
Grade Distribution - CNG Stations
(FY 2025-26)Share of GAs by Grade —
CNG Stations (FY 2025-26)APS Distribution — CNG
Stations (FY 2025-26)Share of GAs by APS — CNG
Stations (FY 2025-26)

Table 2.9: Distribution of GAs as per Performance Grading (Pipeline)

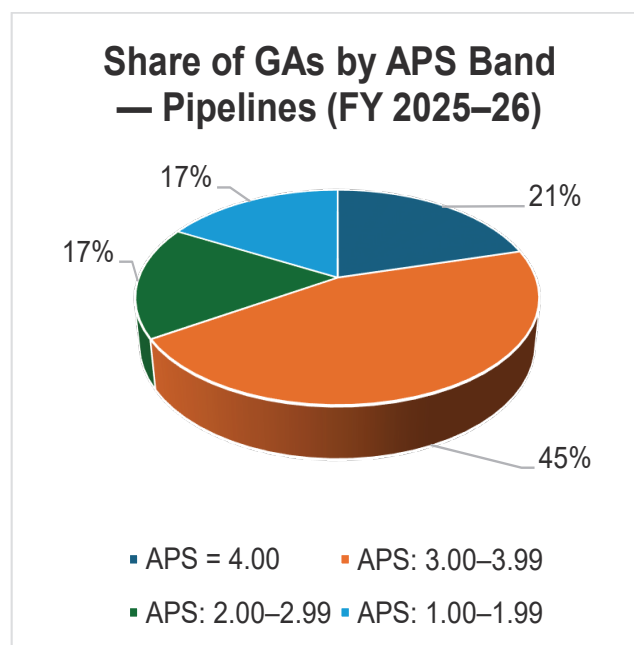
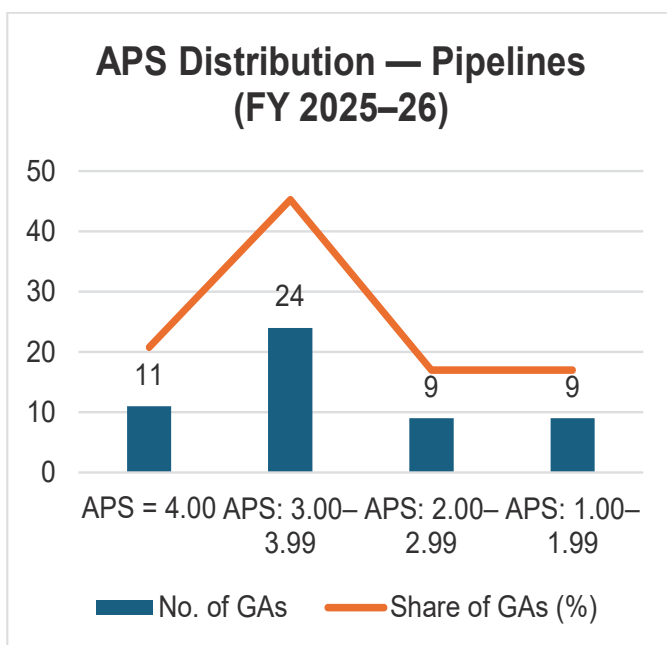
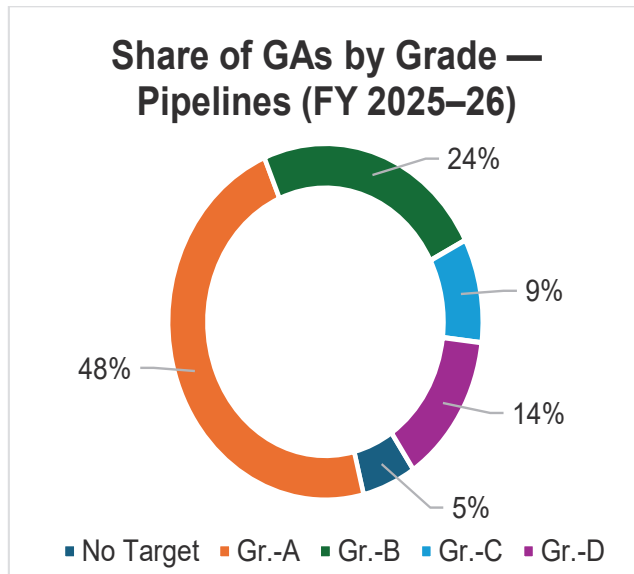
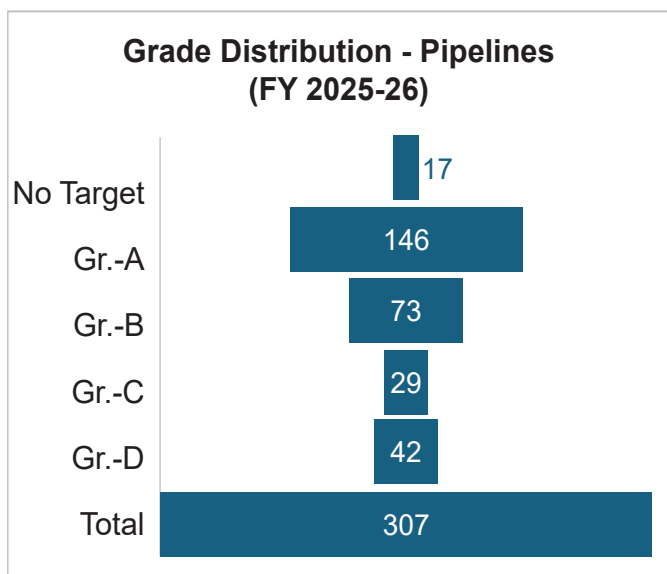
Classification of CGD GAs on 31.03.2026								
S. No.	Authorized CGD Entity	Pipeline (Inch-Km.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
1	Aavantika Gas Limited	0	2	0	0	0	2	4.00
2	Adani Total Gas Limited	1	11	6	6	9	33	2.59
3	AGP CGD India Private Limited	1	1	1	0	0	3	3.50
4	AGP City Gas Private Limited	0	3	5	1	0	9	3.22
5	Assam Gas Company Limited	1	0	0	0	0	1	-
6	Bagpat Green Energy Private Limited	0	1	0	0	0	1	4.00
7	Bengal Gas Company Limited	0	0	0	1	0	1	2.00
8	Bhagyanagar Gas Limited	0	0	2	1	0	3	2.67
9	Bharat Petroleum Corporation Limited	1	17	6	1	1	26	3.56
10	Central UP Gas Limited	0	3	0	0	0	3	4.00
11	Charotar Gas Sahakari Mandali Limited	1	0	0	0	0	1	-
12	Consortium of BPCL & OIL India Ltd	0	0	0	0	1	1	1.00
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	1	0	0	0	0	1	-
14	Dholpur CGD Private Limited	0	0	0	1	0	1	2.00
15	East Coast Natural Gas Private Limited	0	0	0	0	1	1	1.00
16	GAIL (India) Limited	0	4	2	0	0	6	3.67
17	GAIL Gas Limited	0	11	1	1	3	16	3.25
18	Gasonet Services (HP) Limited	1	0	0	0	0	1	-
19	Gasonet Services (RJ) Limited	0	0	0	0	1	1	1.00
20	Gasonet Services (UK) Limited	2	0	0	0	0	2	-
21	Goa Natural Gas Private Limited	0	1	0	0	0	1	4.00
22	Godavari Gas Private Limited	0	0	1	1	0	2	2.50
23	Green Gas Limited	0	3	0	1	0	4	3.50
24	Gujarat Gas Limited	0	18	6	0	3	27	3.44
25	Haridwar Natural Gas Limited	0	1	0	0	0	1	4.00
26	Haryana City Gas (KCE) Private Limited	0	0	1	0	0	1	3.00
27	Haryana City Gas Distribution (Bhiwadi) Limited	0	1	0	0	0	1	4.00
28	Haryana City Gas Distribution Limited	1	0	0	0	0	1	-
29	HCG (KCE) Private Limited	0	0	0	1	0	1	2.00
30	HCG Meghalaya Private Limited	0	0	0	0	1	1	1.00
31	HCG Nagpur Private Limited	0	0	1	0	0	1	3.00

Classification of CGD GAs on 31.03.2026								
S. No.	Authorized CGD Entity	Pipeline (Inch-Km.) Performance Grading of GAs w.r.t Pro-rata Targets						
		No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total	APS
32	HCG Raipur Private Limited	0	0	1	0	0	1	3.00
33	HCG Yanam Private Limited	0	0	1	0	0	1	3.00
34	Hindustan Petroleum Corporation Limited	2	7	4	0	1	14	3.42
35	HPOIL Gas Private Limited	0	2	0	0	1	3	3.00
36	IMC Limited	0	0	1	0	0	1	3.00
37	Indian Oil Corporation Limited	1	15	7	2	1	26	3.44
38	Indian Oil-Adani Gas Private Limited	1	12	6	0	0	19	3.67
39	Indraprastha Gas Limited	1	9	0	0	0	10	4.00
40	IRM Energy Private Limited	0	2	2	0	0	4	3.50
41	Jay Madhok Energy Private Limited led Consortium	0	0	0	0	2	2	1.00
42	Mahanagar Gas Limited	1	2	0	0	0	3	4.00
43	Maharashtra Natural Gas Limited	0	4	2	0	0	6	3.67
44	Megha City Gas Distribution Private Limited	0	2	5	4	11	22	1.91
45	Naveriya Gas Private Limited	0	0	0	1	0	1	2.00
46	North East Gas Distribution Company Limited	0	0	0	1	2	3	1.33
47	Purba Bharati Gas Private Limited	0	0	2	0	0	2	3.00
48	Rajasthan State Gas Limited	0	1	0	0	1	2	2.50
49	Sabarmati Gas Limited	0	2	0	0	0	2	4.00
50	Sholagasco Private Limited	0	0	0	0	1	1	1.00
51	Think Gas Begusarai Private Limited	0	0	1	0	0	1	3.00
52	Think Gas Bhopal Private Limited	0	2	0	0	0	2	4.00
53	Think Gas Ludhiana Private Limited	0	2	0	0	0	2	4.00
54	Torrent Gas Chennai Private Limited	0	0	1	0	0	1	3.00
55	Torrent Gas Jaipur Private Limited	0	0	0	1	0	1	2.00
56	Torrent Gas Limited	0	5	6	3	0	14	3.14
57	Tripura Natural Gas Company Limited	1	0	1	1	2	5	1.75
58	Unison Enviro Private Limited	0	2	0	1	0	3	3.33
59	Vadodara Gas Limited	0	0	1	0	0	1	3.00
Total		17	146	73	29	42	307	

Grouping on the basis of Achievement w.r.t Prorata Target:

Gr.-A: $\geq 100\%$, Gr.-B: $\geq 50\%$ and $< 100\%$, Gr.-C: $\geq 20\%$ and $< 50\%$ & Gr.-D: $< 20\%$

* APS has been calculated only in respect of GAs. with MWP targets.



8. Combined CGD Performance Score (CCPS) of Entities (2025-26)

Table 2.10: Combined CGD Performance Score (CCPS) of Entities (2025-26)

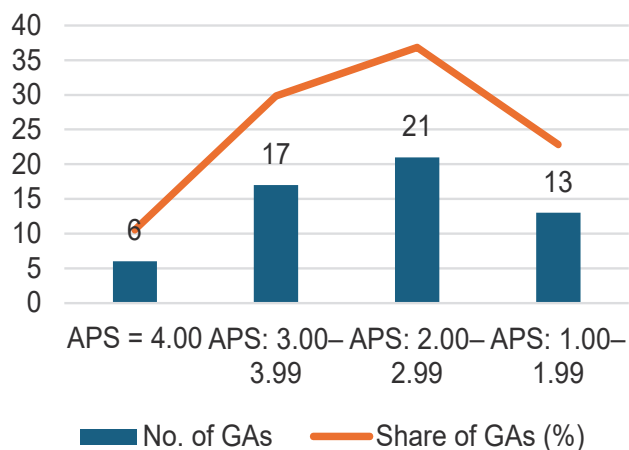
S. No.	Authorized CGD Entity	Total Number of GAs	Average Performance Score (2025-26)			CCPS
			DPNG	CNG	Pipelines	
1	Aavantika Gas Limited	2	4.00	-	4.00	4.00
2	Adani Total Gas Limited	33	1.24	3.41	2.59	2.42
3	AGP CGD India Private Limited	3	1.67	4.00	3.50	3.06
4	AGP City Gas Private Limited	9	1.00	2.11	3.22	2.11
5	Assam Gas Company Limited	1	-	-	-	-
6	Bagpat Green Energy Private Limited	1	3.00	-	4.00	3.50
7	Bengal Gas Company Limited	1	1.00	-	2.00	1.50

S. No.	Authorized CGD Entity	Total Number of Gas	Average Performance Score (2025-26)			CCPS
			DPNG	CNG	Pipelines	
8	Bhagyanagar Gas Limited	3	3.33	4.00	2.67	3.33
9	Bharat Petroleum Corporation Limited	26	2.96	3.73	3.56	3.42
10	Central UP Gas Limited	3	4.00	-	4.00	4.00
11	Charotar Gas Sahakari Mandali Limited	1	-	-	-	-
12	Consortium of BPCL & OIL India Ltd	1	1.00	1.00	1.00	1.00
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	1	1.00	2.00	-	1.50
14	Dholpur CGD Private Limited	1	2.00	3.00	2.00	2.33
15	East Coast Natural Gas Private Limited	1	1.00	1.00	1.00	1.00
16	GAIL (India) Limited	6	4.00	-	3.67	3.83
17	GAIL Gas Limited	16	2.50	3.36	3.25	3.04
18	Gasonet Services (HP) Limited	1	1.00	2.00	-	1.50
19	Gasonet Services (RJ) Limited	1	1.00	2.00	1.00	1.33
20	Gasonet Services (UK) Limited	2	1.00	1.00	-	1.00
21	Goa Natural Gas Private Limited	1	4.00	-	4.00	4.00
22	Godavari Gas Private Limited	2	3.00	-	2.50	2.75
23	Green Gas Limited	4	3.00	4.00	3.50	3.50
24	Gujarat Gas Limited	27	2.85	3.57	3.44	3.29
25	Haridwar Natural Gas Limited	1	4.00	-	4.00	4.00
26	Haryana City Gas (KCE) Private Limited	1	1.00	4.00	3.00	2.67
27	Haryana City Gas Distribution (Bhiwadi) Limited	1	2.00	-	4.00	3.00
28	Haryana City Gas Distribution Limited	1	2.00	-	-	2.00
29	HCG (KCE) Private Limited	1	1.00	4.00	2.00	2.33
30	HCG Meghalaya Private Limited	1	-	-	1.00	1.00
31	HCG Nagpur Private Limited	1	1.00	3.00	3.00	2.33
32	HCG Raipur Private Limited	1	1.00	1.00	3.00	1.67
33	HCG Yanam Private Limited	1	1.00	2.00	3.00	2.00
34	Hindustan Petroleum Corporation Limited	14	1.43	3.21	3.42	2.69
35	HPOIL Gas Private Limited	3	3.00	1.00	3.00	2.33
36	IMC Limited	1	4.00	-	3.00	3.50
37	Indian Oil Corporation Limited	26	2.04	2.80	3.44	2.76
38	Indian Oil-Adani Gas Private Limited	19	2.26	3.20	3.67	3.04
39	Indraprastha Gas Limited	10	3.80	3.20	4.00	3.67

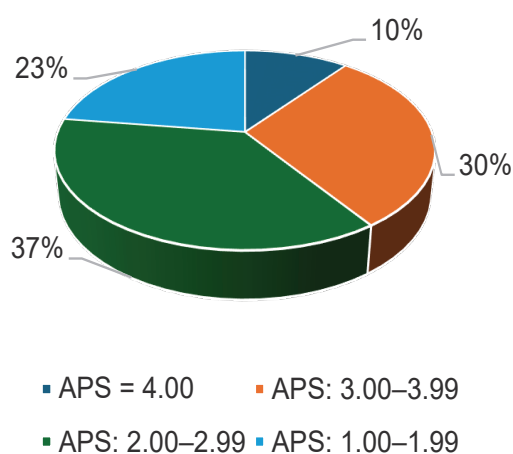
S. No.	Authorized CGD Entity	Total Number of GAs	Average Performance Score (2025-26)			CCPS
			DPNG	CNG	Pipelines	
40	IRM Energy Private Limited	4	2.75	3.50	3.50	3.25
41	Jay Madhok Energy Private Limited led Consortium	2	1.00	-	1.00	1.00
42	Mahanagar Gas Limited	3	4.00	-	4.00	4.00
43	Maharashtra Natural Gas Limited	6	2.67	4.00	3.67	3.44
44	Megha City Gas Distribution Private Limited	22	1.33	2.28	1.91	1.84
45	Naveriya Gas Private Limited	1	4.00	-	2.00	3.00
46	North East Gas Distribution Company Limited	3	1.00	1.00	1.33	1.11
47	Purba Bharati Gas Private Limited	2	1.00	2.00	3.00	2.00
48	Rajasthan State Gas Limited	2	2.00	3.50	2.50	2.67
49	Sabarmati Gas Limited	2	4.00	-	4.00	4.00
50	Sholagasco Private Limited	1	1.00	1.00	1.00	1.00
51	Think Gas Begusarai Private Limited	1	1.00	3.00	3.00	2.33
52	Think Gas Bhopal Private Limited	2	1.50	3.00	4.00	2.83
53	Think Gas Ludhiana Private Limited	2	1.00	3.50	4.00	2.83
54	Torrent Gas Chennai Private Limited	1	1.00	3.00	3.00	2.33
55	Torrent Gas Jaipur Private Limited	1	1.00	4.00	2.00	2.33
56	Torrent Gas Limited	14	1.86	3.67	3.14	2.89
57	Tripura Natural Gas Company Limited	5	2.00	2.50	1.75	2.08
58	Unison Enviro Private Limited	3	3.67	3.50	3.33	3.50
59	Vadodara Gas Limited	1	3.00	-	3.00	3.00

APS is not indicated against metric with no MWP targets for GAs.

CCPS Distribution (FY 2025-26)



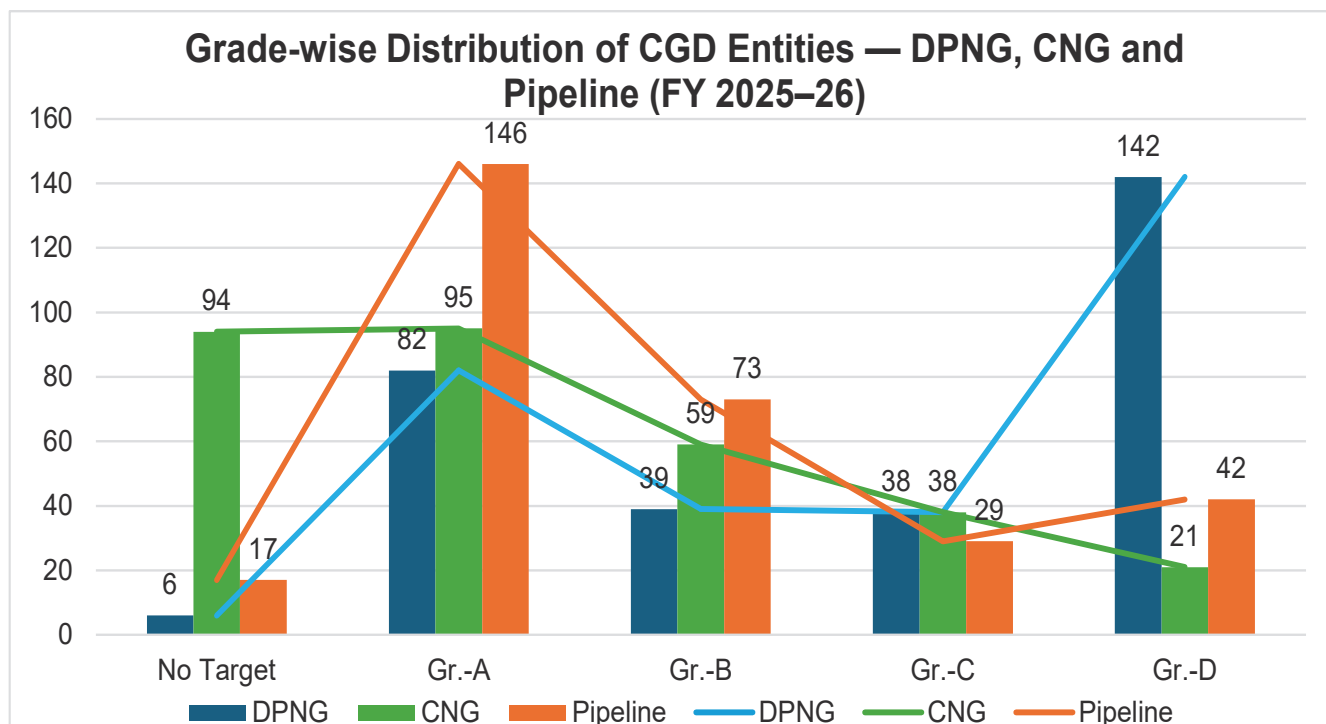
Share of GAs by CCPS (FY 2025-26)



9. Grade Distribution — DPNG, CNG and Pipeline (2025-26)

Table 2.11: Grade Distribution of CGD Entities — DPNG, CNG and Pipeline

Metric	No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total
DPNG	6	82	39	38	142	307
CNG	94	95	59	38	21	307
Pipeline	17	146	73	29	42	307



10. Year wise CCPS (from 2023-24 to 2025-26)

Table 2.12: Year wise CCPS (from 2023-24 to 2025-26)

S. No.	Authorized CGD Entity	Total Number of GAs	Year wise CCPS			
			2023-24	2024-25	2025-26	AVG. CCPS
1	Aavantika Gas Limited	2	4.00	4.00	4.00	4.00
2	Adani Total Gas Limited	33	2.56	2.45	2.42	2.48
3	AGP CGD India Private Limited	3	3.06	3.06	3.06	3.06
4	AGP City Gas Private Limited	9	2.63	2.37	2.11	2.37
5	Assam Gas Company Limited	1	-	-	-	-
6	Bagpat Green Energy Private Limited	1	3.00	3.00	3.50	3.17
7	Bengal Gas Company Limited	1	2.00	1.50	1.50	1.67
8	Bhagyanagar Gas Limited	3	3.33	3.33	3.33	3.33
9	Bharat Petroleum Corporation Limited	26	3.29	3.46	3.42	3.39

S. No.	Authorized CGD Entity	Total Number of GAs	Year wise CCPS			
			2023-24	2024-25	2025-26	AVG. CCPS
10	Central UP Gas Limited	3	3.83	4.00	4.00	3.94
11	Charotar Gas Sahakari Mandali Limited	1	-	-	-	-
12	Consortium of BPCL & OIL India Ltd	1	-	1.00	1.00	1.00
13	Consortium of THINK Gas Distribution Private Limited, Think Gas Investment Pte. Ltd. & Think Gas Investment Pte. II Ltd	1	-	-	1.50	1.50
14	Dholpur CGD Private Limited	1	2.67	2.67	2.33	2.56
15	East Coast Natural Gas Private Limited	1	1.00	1.00	1.00	1.00
16	GAIL (India) Limited	6	3.58	3.58	3.83	3.67
17	GAIL Gas Limited	16	3.23	3.13	3.04	3.13
18	Gasonet Services (HP) Limited	1	1.50	1.50	1.50	1.50
19	Gasonet Services (RJ) Limited	1	1.67	1.33	1.33	1.44
20	Gasonet Services (UK) Limited	2	1.50	1.00	1.00	1.17
21	Goa Natural Gas Private Limited	1	4.00	4.00	4.00	4.00
22	Godavari Gas Private Limited	2	2.75	2.75	2.75	2.75
23	Green Gas Limited	4	3.58	3.58	3.50	3.56
24	Gujarat Gas Limited	27	3.38	3.42	3.29	3.36
25	Haridwar Natural Gas Limited	1	4.00	4.00	4.00	4.00
26	Haryana City Gas (KCE) Private Limited	1	3.00	3.00	2.67	2.89
27	Haryana City Gas Distribution (Bhiwadi) Limited	1	3.00	3.00	3.00	3.00
28	Haryana City Gas Distribution Limited	1	2.00	2.00	2.00	2.00
29	HCG (KCE) Private Limited	1	2.33	2.33	2.33	2.33
30	HCG Meghalaya Private Limited	1	-	-	1.00	1.00
31	HCG Nagpur Private Limited	1	3.00	1.67	2.33	2.33
32	HCG Raipur Private Limited	1	1.00	1.33	1.67	1.33
33	HCG Yanam Private Limited	1	2.00	2.67	2.00	2.22
34	Hindustan Petroleum Corporation Limited	14	2.81	2.75	2.69	2.75
35	HPOIL Gas Private Limited	3	3.75	3.50	2.33	3.19
36	IMC Limited	1	-	3.00	3.50	3.25
37	Indian Oil Corporation Limited	26	3.22	3.01	2.76	3.00
38	Indian Oil-Adani Gas Private Limited	19	3.11	3.11	3.04	3.09

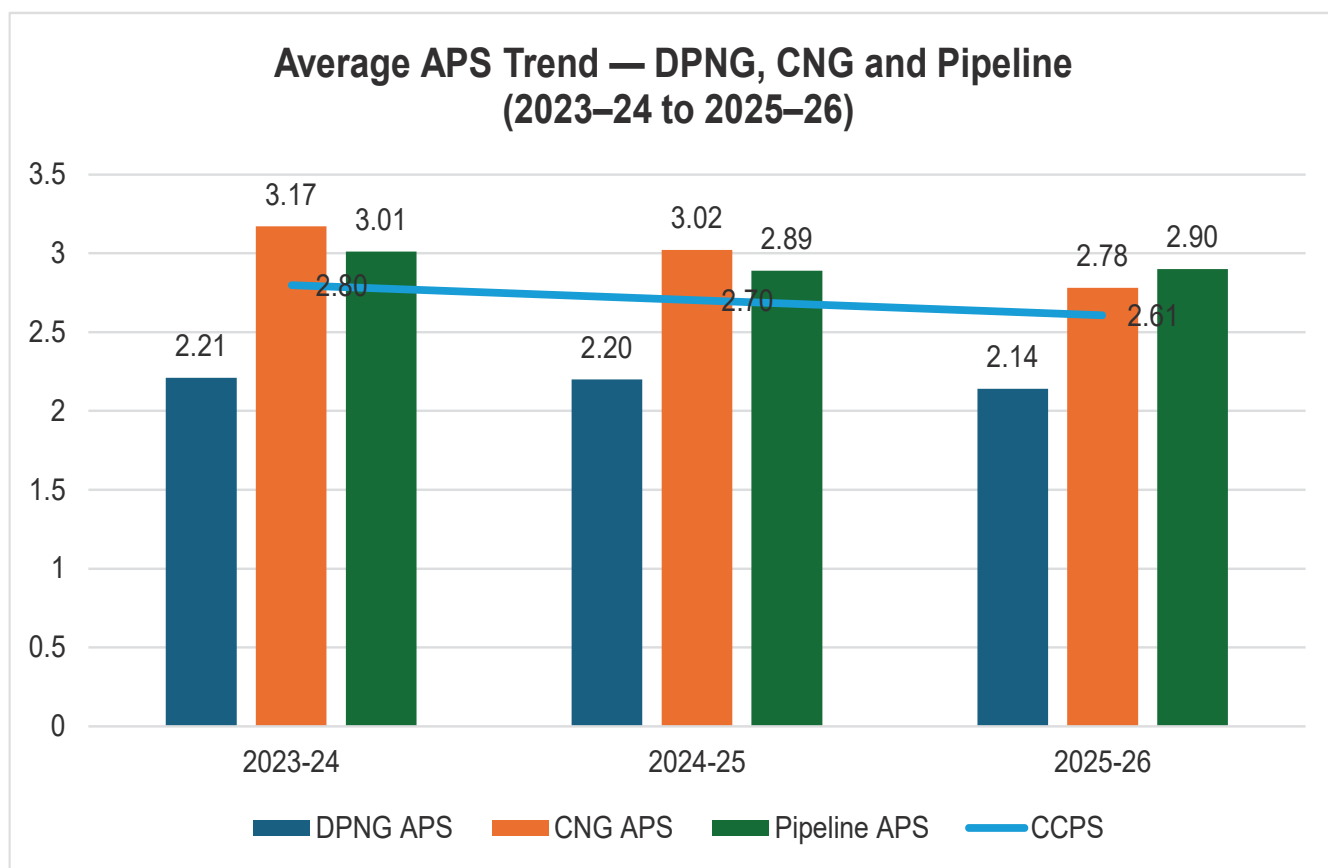
S. No.	Authorized CGD Entity	Total Number of GAs	Year wise CCPS			
			2023-24	2024-25	2025-26	AVG. CCPS
39	Indraprastha Gas Limited	10	3.89	3.90	3.67	3.82
40	IRM Energy Private Limited	4	3.78	3.36	3.25	3.46
41	Jay Madhok Energy Private Limited Consortium	2	1.00	1.00	1.00	1.00
42	Mahanagar Gas Limited	3	4.00	4.00	4.00	4.00
43	Maharashtra Natural Gas Limited	6	3.81	3.42	3.44	3.56
44	Megha City Gas Distribution Private Limited	22	1.82	1.80	1.84	1.82
45	Naveriya Gas Private Limited	1	2.50	3.00	3.00	2.83
46	North East Gas Distribution Company Limited	3	1.00	1.11	1.11	1.07
47	Purba Bharati Gas Private Limited	2	1.83	1.67	2.00	1.83
48	Rajasthan State Gas Limited	2	2.33	2.67	2.67	2.56
49	Sabarmati Gas Limited	2	4.00	4.00	4.00	4.00
50	Sholagasco Private Limited	1	1.50	1.00	1.00	1.17
51	Think Gas Begusarai Private Limited	1	2.67	2.33	2.33	2.44
52	Think Gas Bhopal Private Limited	2	3.33	3.17	2.83	3.11
53	Think Gas Ludhiana Private Limited	2	3.00	2.83	2.83	2.89
54	Torrent Gas Chennai Private Limited	1	3.00	2.67	2.33	2.67
55	Torrent Gas Jaipur Private Limited	1	2.67	2.67	2.33	2.56
56	Torrent Gas Limited	14	2.97	2.89	2.89	2.92
57	Tripura Natural Gas Company Limited	5	3.17	2.92	2.08	2.72
58	Unison Enviro Private Limited	3	3.11	3.33	3.50	3.31
59	Vadodara Gas Limited	1	3.00	3.00	3.00	3.00

CCPS is not indicated against metric with no MWP targets for GAs.

11. Year wise APS – DPNG, CNG and Pipeline (from 2023-24 to 2025-26)

Table 2.13: APS – DPNG, CNG and Pipeline (from 2023-24 to 2025-26)

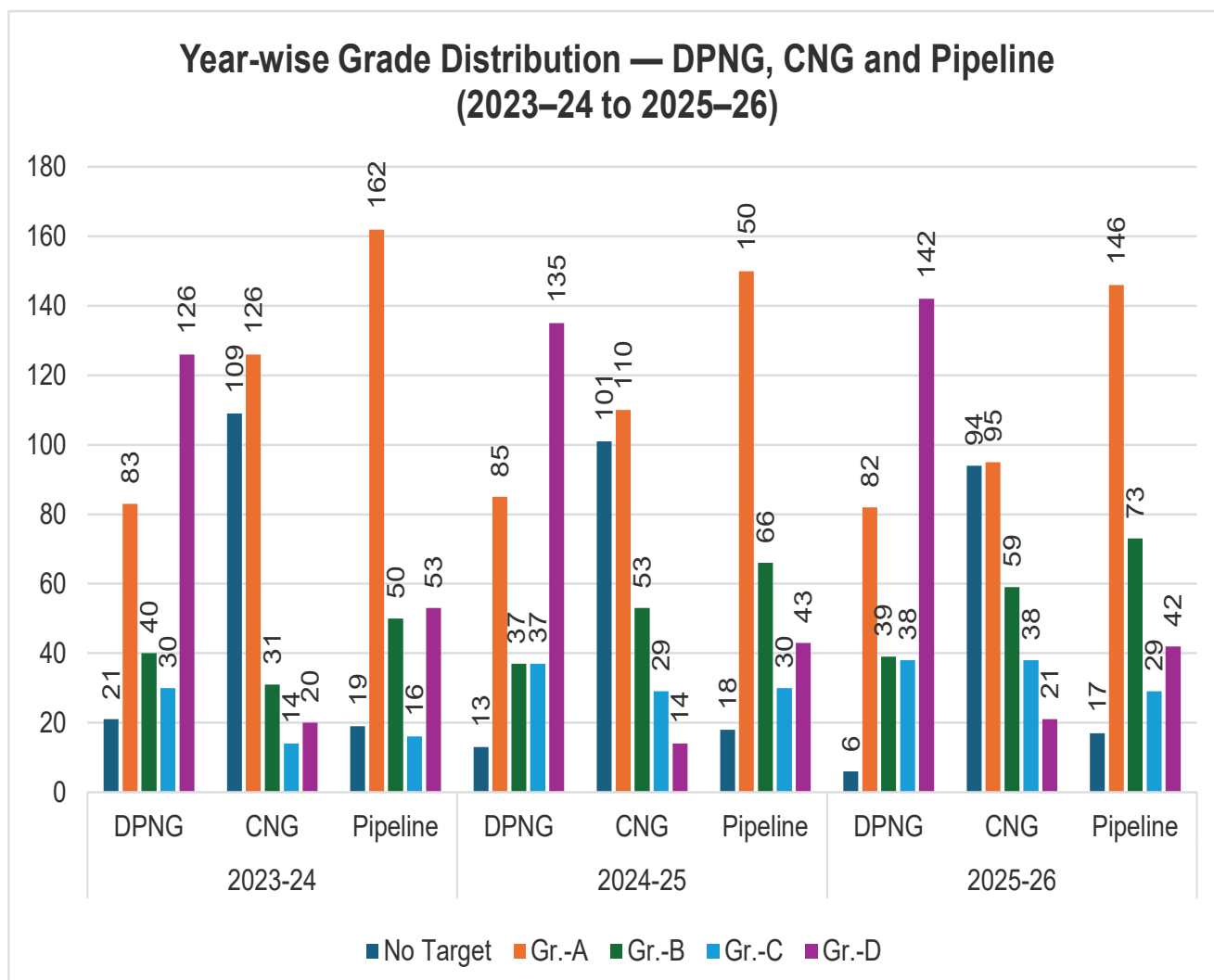
Metric	2023-24	2024-25	2025-26
DPNG APS	2.21	2.20	2.14
CNG APS	3.17	3.02	2.78
Pipeline APS	3.01	2.89	2.90
AVG. APS	2.80	2.70	2.61



12. Grade Distribution - DPNG, CNG & Pipeline (2023-24 to 2025-26)

Table 2.14: Grade Distribution – DPNG, CNG & Pipeline (2023-24 to 2025-26)

Year	Metric	No Target	Gr.-A	Gr.-B	Gr.-C	Gr.-D	Total
2023-24	DPNG	21	83	40	30	126	300
	CNG	109	126	31	14	20	300
	Pipeline	19	162	50	16	53	300
2024-25	DPNG	13	85	37	37	135	307
	CNG	101	110	53	29	14	307
	Pipeline	18	150	66	30	43	307
2025-26	DPNG	6	82	39	38	142	307
	CNG	94	95	59	38	21	307
	Pipeline	17	146	73	29	42	307


Table 2.15: Overall Grade Distribution (DPNG + CNG + Pipeline) from 2023–24 to 2025–26

Metric	2023-24	2024-25	2025-26
No Target	149	132	117
Gr.-A	371	345	323
Gr.-B	121	156	171
Gr.-C	60	96	105
Gr.-D	199	192	205

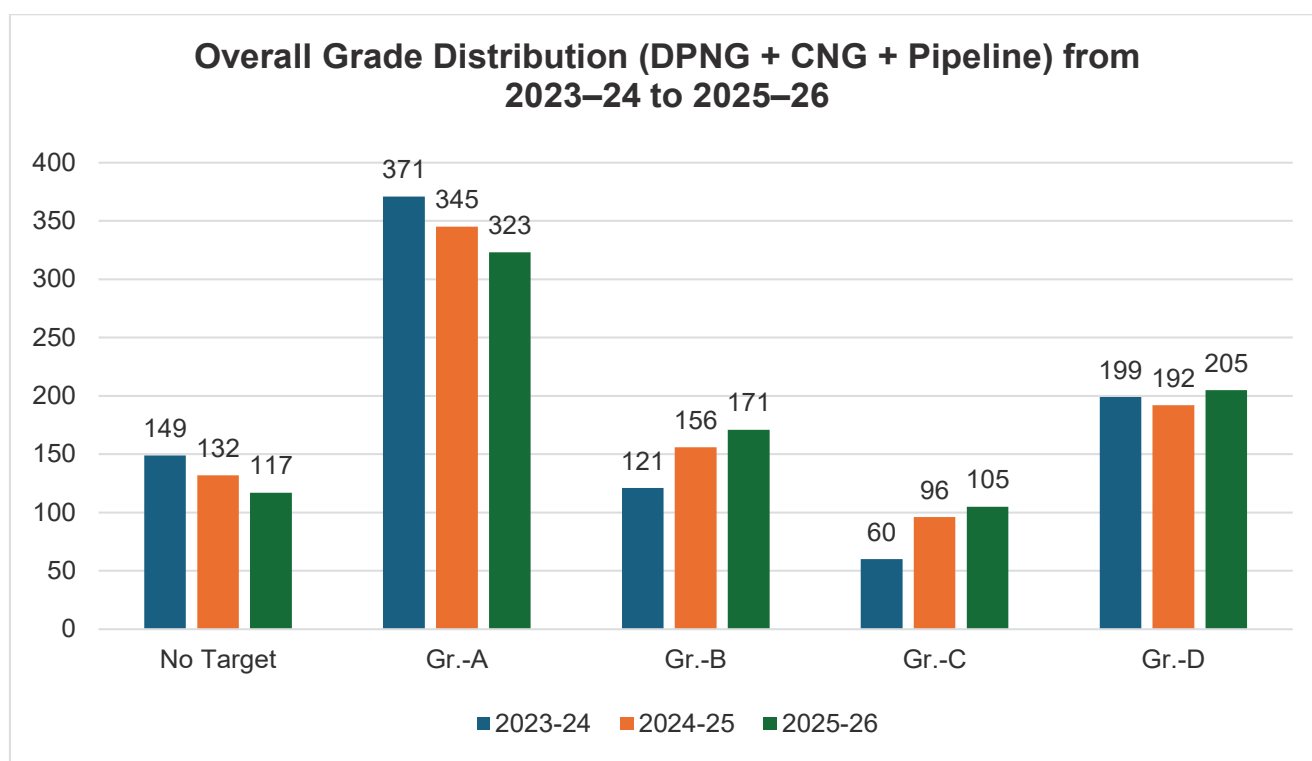
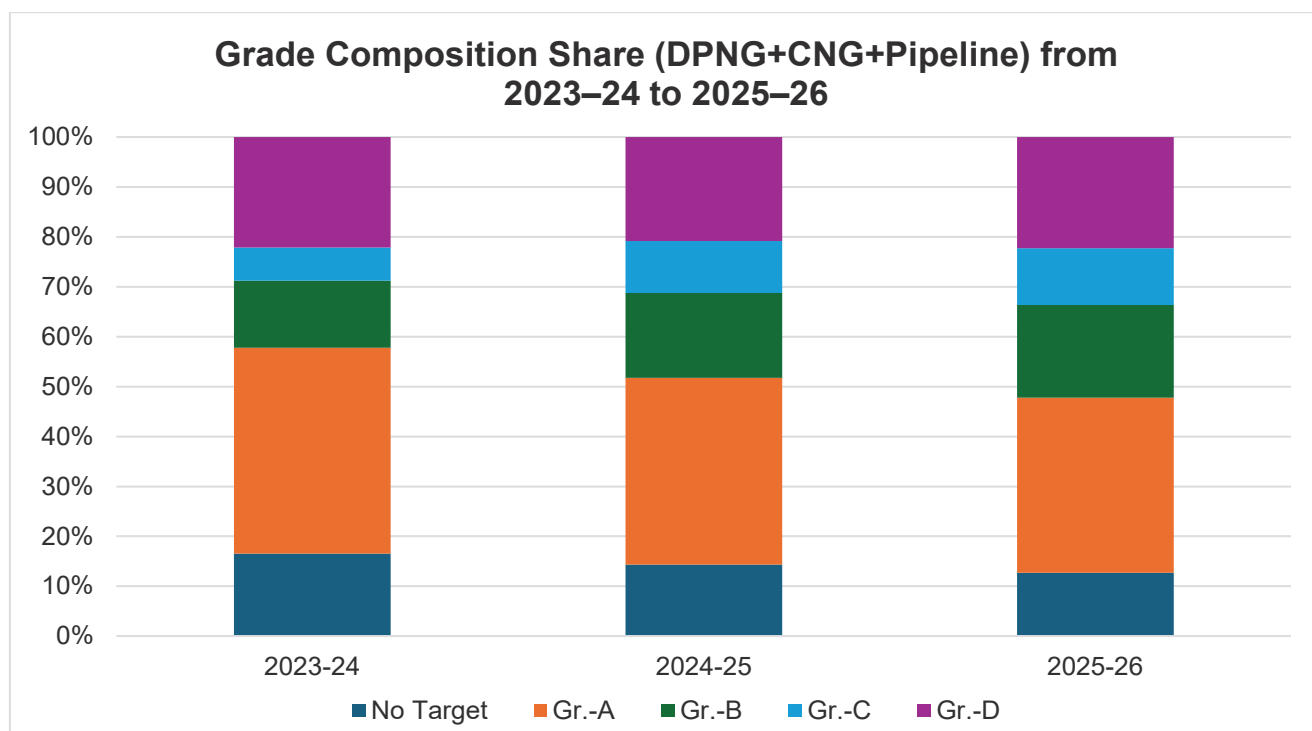
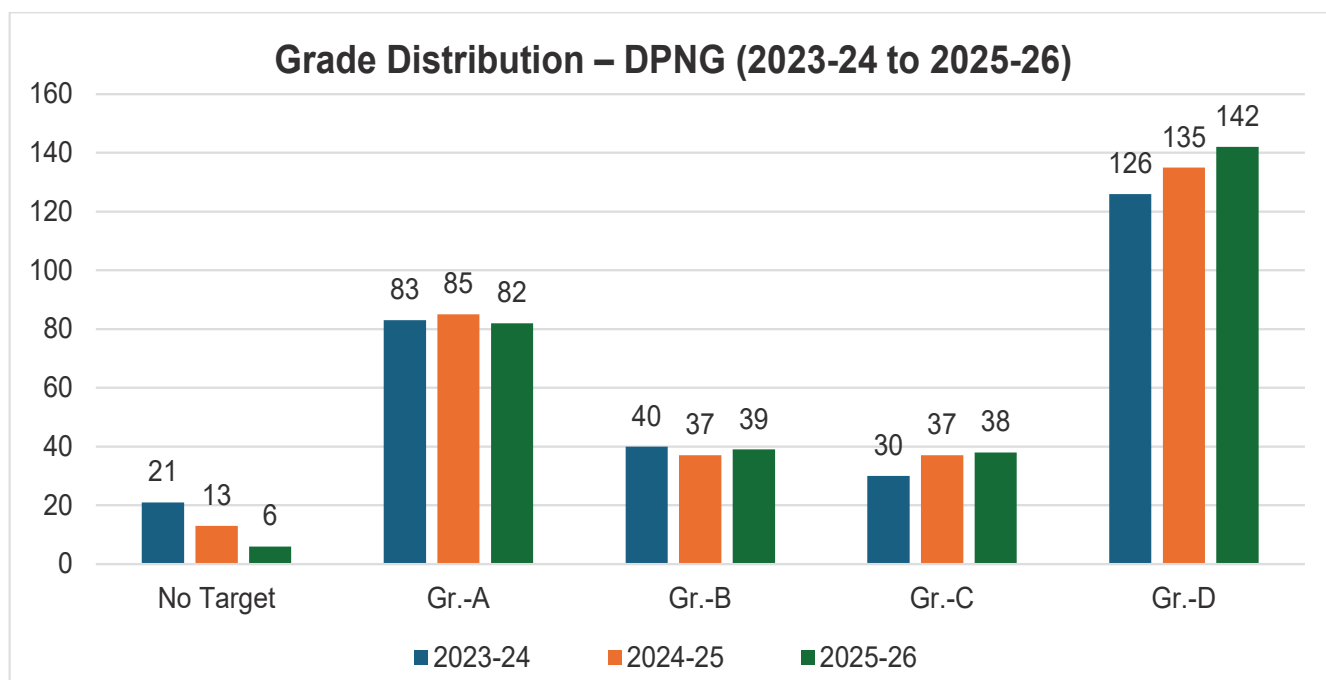


Table 2.16: Grade Distribution – DPNG (2023-24 to 2025-26)

DPNG	2023-24	2024-25	2025-26
No Target	21	13	6
Gr.-A	83	85	82
Gr.-B	40	37	39
Gr.-C	30	37	38
Gr.-D	126	135	142


Table 2.17: Grade Distribution – CNG Stations (2023-24 to 2025-26)

CNG Stations	2023-24	2024-25	2025-26
No Target	109	101	94
Gr.-A	126	110	95
Gr.-B	31	53	59
Gr.-C	14	29	38
Gr.-D	20	14	21

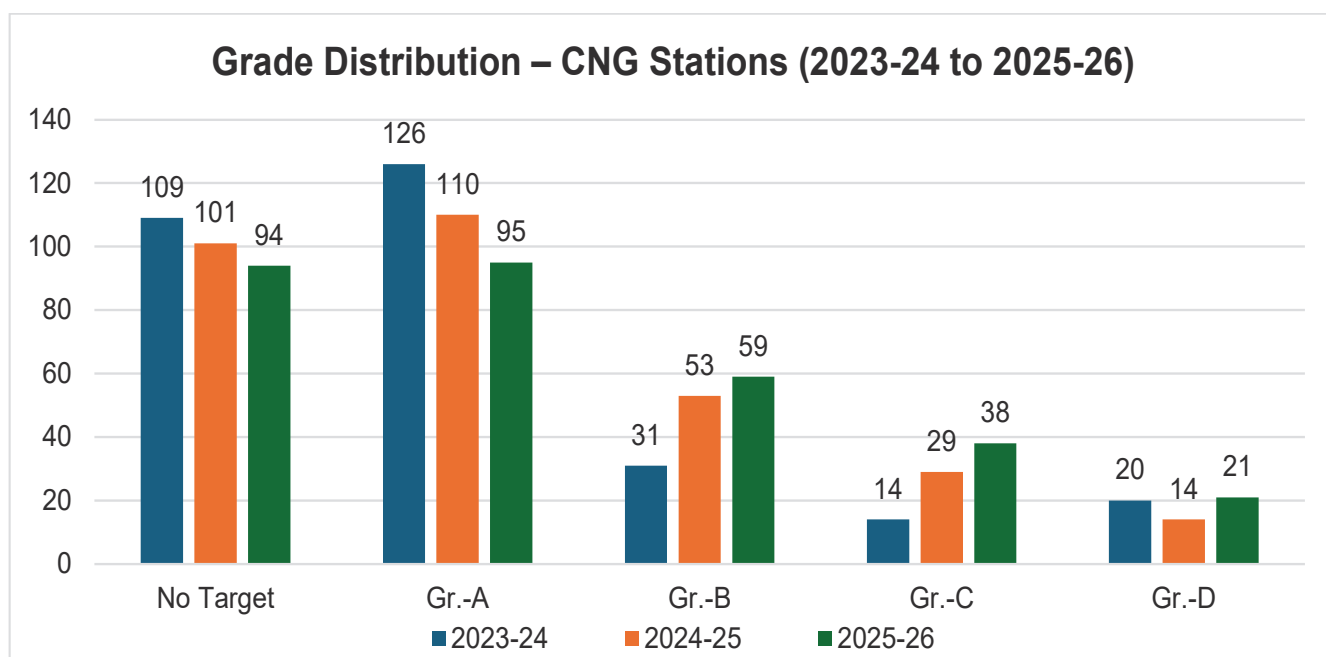
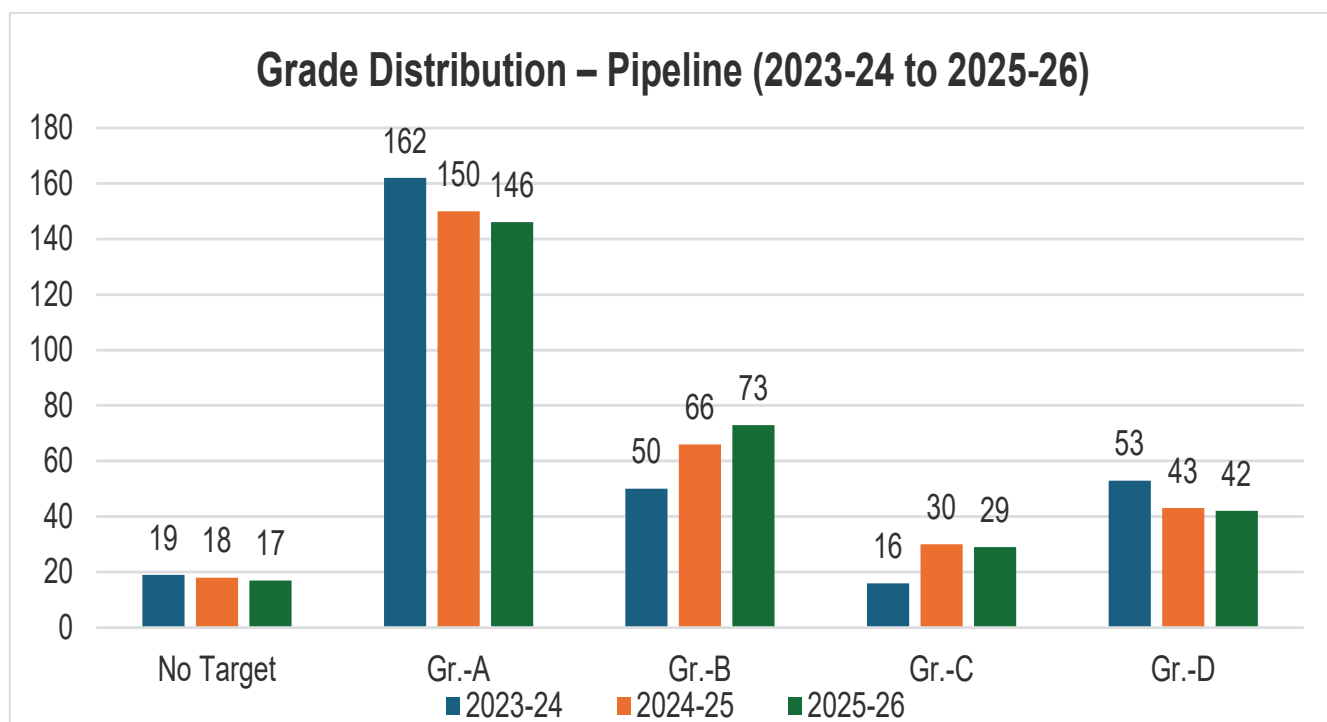


Table 2.18: Grade Distribution – Pipeline (2023-24 to 2025-26)

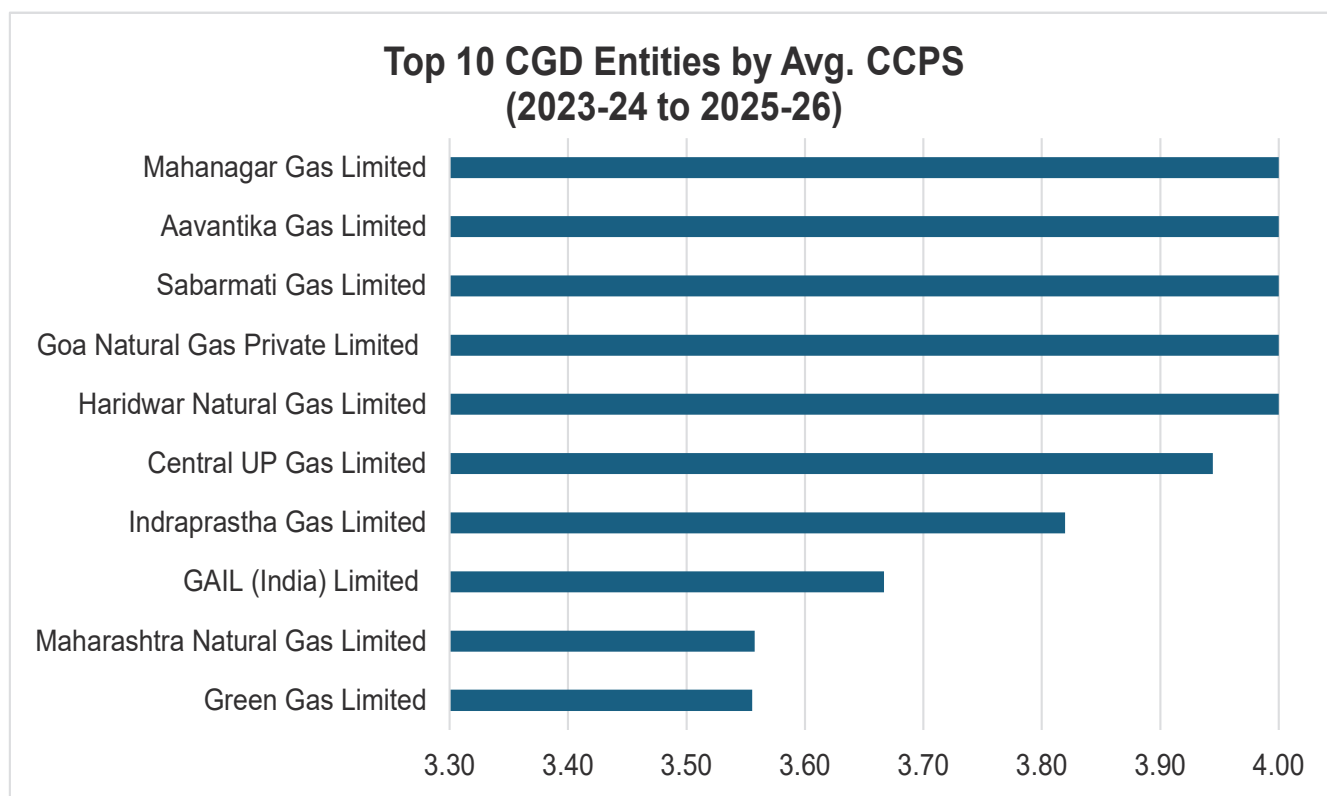
Pipelines	2023-24	2024-25	2025-26
No Target	19	18	17
Gr.-A	162	150	146
Gr.-B	50	66	73
Gr.-C	16	30	29
Gr.-D	53	43	42



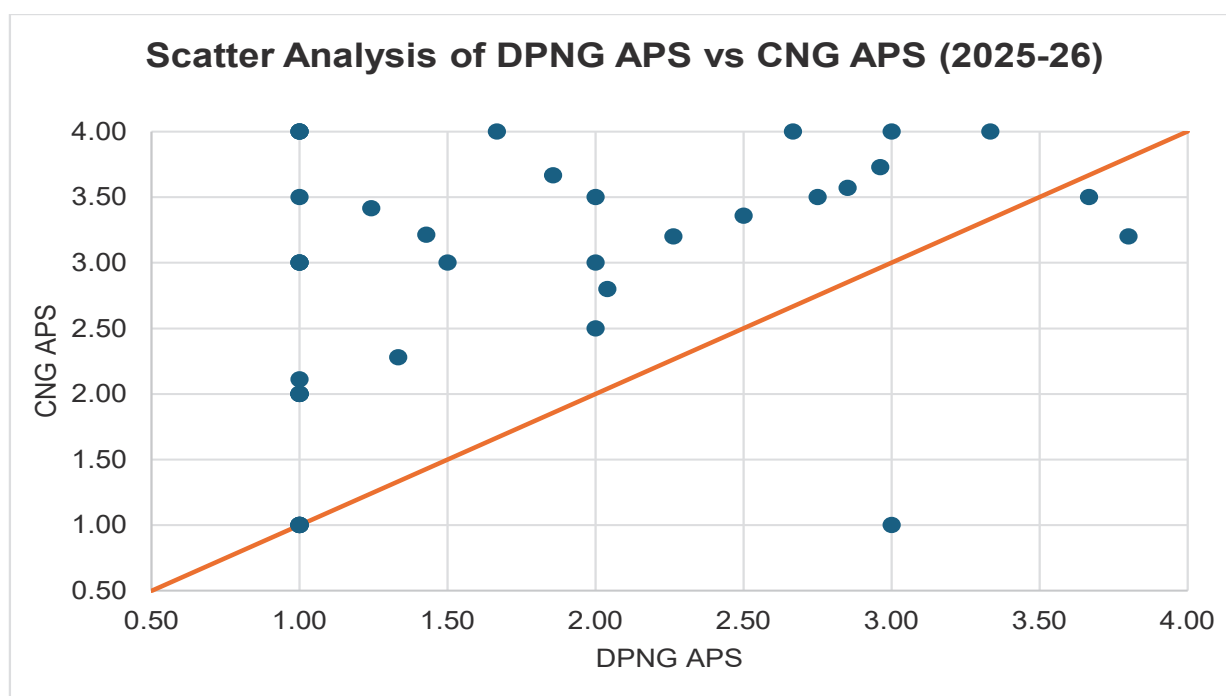
13. Top 10 CGD Entities by CCPS (2023-24 to 2025-26)

Table 2.19: Top 10 CGD Entities by CCPS (2023-24 to 2025-26)

S.No.	Authorized CGD Entity	Total Number of GAS	CCPS			
			2023-24	2024-25	2025-26	AVG. CCPS
1	Mahanagar Gas Limited	3	4.00	4.00	4.00	4.00
2	Aavantika Gas Limited	2	4.00	4.00	4.00	4.00
3	Sabarmati Gas Limited	2	4.00	4.00	4.00	4.00
4	Goa Natural Gas Private Limited	1	4.00	4.00	4.00	4.00
5	Haridwar Natural Gas Limited	1	4.00	4.00	4.00	4.00
6	Central UP Gas Limited	3	3.83	4.00	4.00	3.94
7	Indraprastha Gas Limited	10	3.89	3.90	3.67	3.82
8	GAIL (India) Limited	6	3.58	3.58	3.83	3.67
9	Maharashtra Natural Gas Limited	6	3.81	3.42	3.44	3.56
10	Green Gas Limited	4	3.58	3.58	3.50	3.56



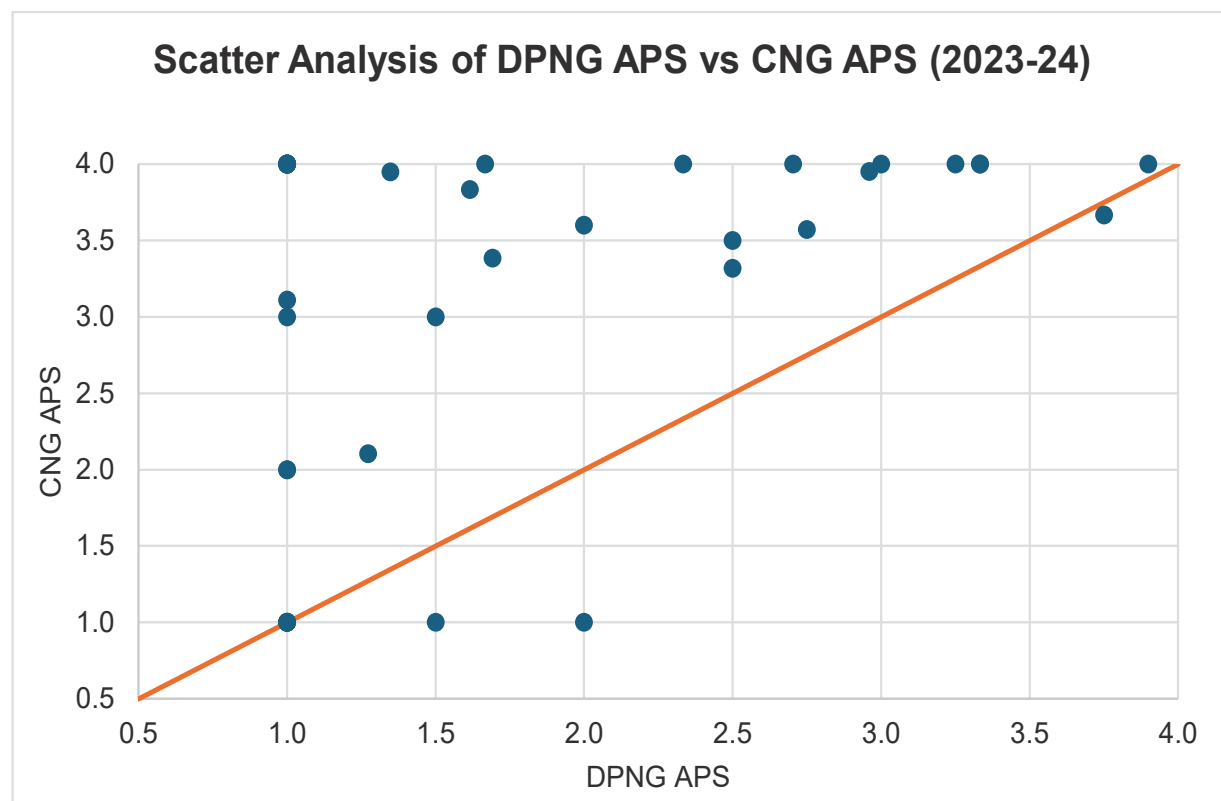
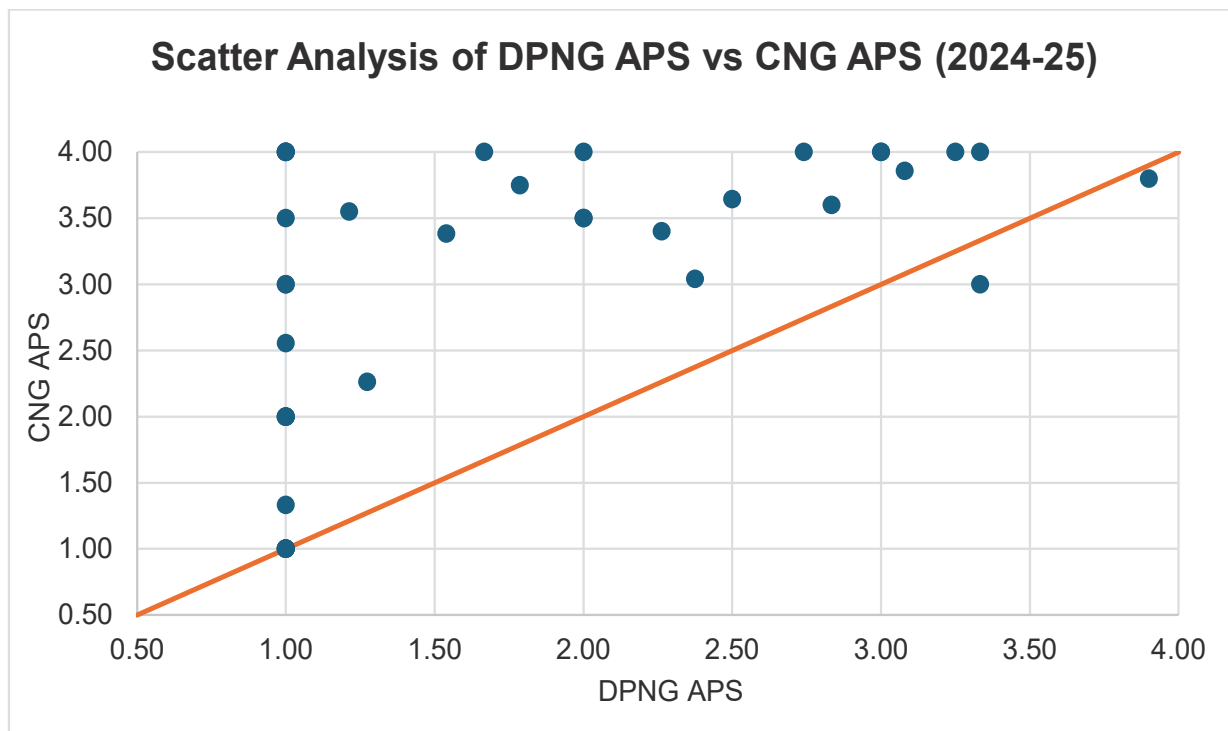
14. DPNG vs CNG Performance — A Scatter Analysis, FY 2025–26



Note: Each data point on the plot represents an entity. In instances where multiple entities achieve identical scores, their respective points overlap directly; consequently, a single point may denote one or more entities sharing the same scores.

As on 31 March 2026, of the 40 CGD entities with a valid APS score on both DPNG and CNG metrics, 31 (78%) recorded a higher score on CNG Stations than on DPNG Connections. The average CNG

APS (2.78) exceeded the average DPNG APS (2.14) by a margin of 0.64 points on the 1–4 scale. The correlation between the two APS scores was moderate (0.43), indicating that an entity's CNG performance offers only a partial indication of its DPNG performance. The gap between DPNG and CNG performance is structural, not incidental. Close to four in every five CGD entities performed better against CNG station targets than DPNG connection targets during the year, indicating a consistent, sector-wide pattern rather than an issue confined to a small number of entities.



15. GAs with performance 100% or more w.r.t Pro-Rata targets in all three metrics (DPNG, CNG and Pipelines) during 2025-26

Table 2.20: GAs with performance 100% or more w.r.t Pro-Rata targets, FY 2025-26

GA ID	GA/ CGD Network	State	Entity	Date of Authorization
1.01	Dewas	Madhya Pradesh	GAIL Gas Limited	01-06-09
9.13	Narmada (Rajpipla) District	Gujarat	Gujarat Gas Limited	06-09-18
9.26	Ballari & Gadag Districts	Karnataka	Bharat Petroleum Corporation Limited	24-09-18
9.27	Bidar District	Karnataka	Bharat Petroleum Corporation Limited	10-08-18
9.40	Latur & Osmanabad Districts	Maharashtra	Unison Enviro Private Limited	24-09-18
9.42	Sindhudurg District	Maharashtra	Maharashtra Natural Gas Limited	06-09-18
9.43	Angul & Dhekanal Districts	Odisha	Bharat Petroleum Corporation Limited	10-08-18 (New start date 01.01.22)
9.46	Bargarh, Debagarh & Sambalpur Districts	Odisha	Bharat Petroleum Corporation Limited	28-09-2018 (New start date 01.01.22)
9.48	Jagatsinghpur & Kendrapara Districts	Odisha	Bharat Petroleum Corporation Limited	26-09-2018 (New start date 01.01.22)
9.49	Jajpur & Kendujhar Districts	Odisha	Bharat Petroleum Corporation Limited	26-09-2018 (New start date 01.01.22)
9.80	Faizabad & Sultanpur Districts	Uttar Pradesh	Green Gas Limited	24-09-18
9.82	Meerut District (EAAA), Muzaffarnagar & Shamli Districts	Uttar Pradesh	Indraprastha Gas Limited	13-09-18
10.24	Morena District	Madhya Pradesh	Indian Oil Corporation Limited	29-03-19
10.42	Kanpur (EAAA) District, Fatehpur and Hamirpur Districts	Uttar Pradesh	Indraprastha Gas Limited	29-03-19

CHAPTER III

Natural Gas Pipeline Network

Natural Gas Pipelines (NGPL) constitute the backbone of the natural gas transmission system in the country, providing the physical connectivity required for movement of natural gas from production sources, LNG import terminals and other supply points to demand centres, including City Gas Distribution (CGD), fertiliser, power, industrial and other consumers. The development of an interconnected natural gas pipeline network is therefore an important element in facilitating wider availability and use of natural gas across regions.

The Petroleum and Natural Gas Regulatory Board (PNGRB), under its regulatory mandate, maintains and publishes statistical information on the NGPL sector through its Data Bank. The published MIS provides information on the authorised and operational pipeline network, pipeline capacity, gas transported and capacity utilisation, along with periodic information on the physical progress of pipelines under construction and partially commissioned networks. These datasets provide a consolidated statistical view of the development and utilisation of the natural gas transmission infrastructure.

The NGPL network comprises pipelines and regional networks operated by multiple authorised entities. The published information provides entity-wise operating length as well as network-wise details, thereby enabling the statistical assessment of the geographical spread and operational status of the transmission infrastructure. PNGRB separately maintains records of authorised natural gas pipelines and their authorised entities, including networks authorised under different regulatory provisions.

Capacity utilisation is the relationship between the available/determined transportation capacity and the capacity utilised during the reporting period. Accordingly, capacity utilisation is presented in this Report as an indicator of the use of available transmission infrastructure and is not, by itself, intended to constitute a measure of the overall performance of an individual pipeline or entity.

1. Natural Gas Pipelines (NGPL) — Key Insights

As at 31 March 2026, the NGPL network covered 34,803 Km of authorised length, of which 27,905 Km was operating, indicating that about 80.2% of the authorised network was operational.

Average gas supplied through the operating and partially commissioned pipelines remained broadly stable at 243.09 MMSCMD in FY 2025–26.

The network, however, exhibits significant variation in utilisation across individual pipelines. The HVJ (HVJ-GREP-DVPL, DVPL-GREP Upgradation) Pipeline remained the largest contributor to gas supply at 77.86 MMSCMD, followed by the Kakinada–Hyderabad–Uran–Ahmedabad (East West) Pipeline at 34.81 MMSCMD and the High Pressure Gujarat Gas Grid at 33.52 MMSCMD in FY 2025–26.

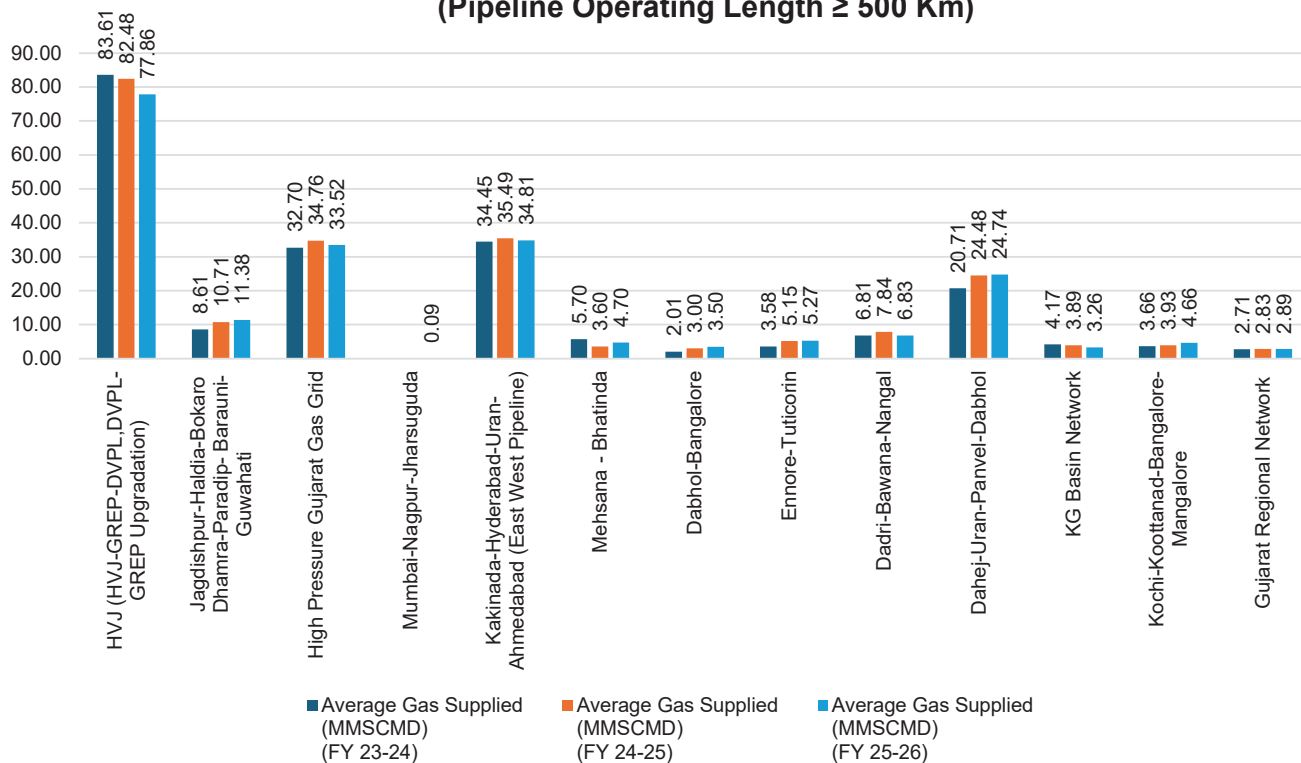
Several relatively new or regional pipelines recorded low or emerging throughput, while some networks showed improvement during the year. This indicates that physical expansion of the network and effective utilisation of created capacity are distinct dimensions of pipeline development and merit consideration together.

NGPL has a substantially larger network and continued to support high-volume gas transportation, but aggregate gas supply remained broadly stable in FY 2025–26.

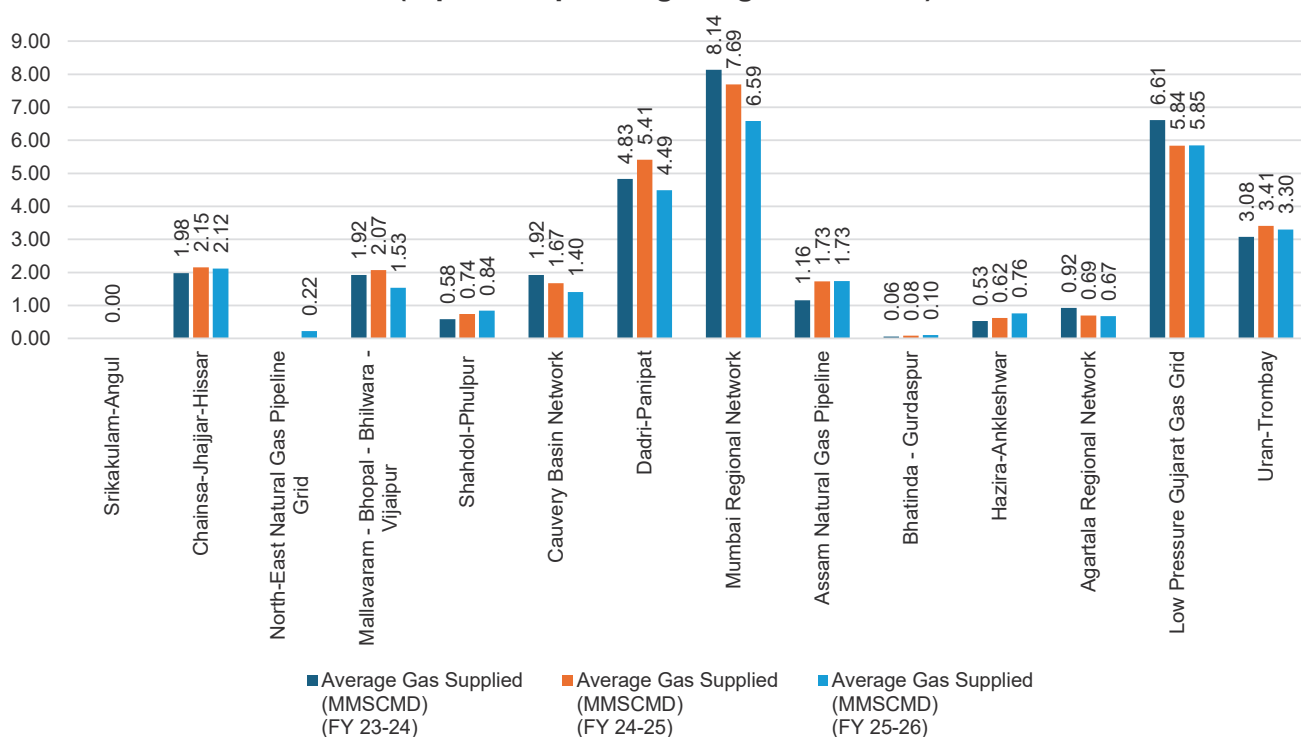
Table 3.1: Throughput details of NGPL (Operational and Partially Commissioned Pipelines)

Throughput Details of NGPL (Operational and Partially Commissioned Pipelines)								
S. No.	Entity	Pipeline Name	Authorised Length (Km)	Operating Length* (Km)	Authorised/ Determined Capacity* (MMSCMD)	Average Gas Supplied (MMSCMD) (FY 23-24)	Average Gas Supplied (MMSCMD) (FY 24-25)	Average Gas Supplied (MMSCMD) (FY 25-26)
1	GAIL	HVJ (HVJ-GREP-DVPL, DVPL-GREP Upgradation)	6,169	6,732	107.00	83.61	82.48	77.86
2	GAIL	Jagdishpur-Haldia-Bokaro Dhamra-Paradip- Barauni-Guwahati	3,546	3,289	23.00	8.61	10.71	11.38
3	GSPL	High Pressure Gujarat Gas Grid	2,860	2,748	36.00	32.70	34.76	33.52
4	GAIL	Mumbai-Nagpur-Jharsuguda	1,755	1,503	16.50	-	-	0.09
5	PIL	Kakinada-Hyderabad-Uran-Ahmedabad (East West Pipeline)	1,459	1,485	85.00	34.45	35.49	34.81
6	GIGL	Mehsana - Bhatinda	1,943	1,318	83.11	5.70	3.60	4.70
7	GAIL	Dabhol-Bangalore	1,414	1,182	16.00	2.01	3.00	3.50
8	IOCL	Ennore-Tuticorin	1,431	1,121	84.67	3.58	5.15	5.27
9	GAIL	Dadri-Bawana-Nangal	921	998	31.00	6.81	7.84	6.83
10	GAIL	Dahej-Uran-Panvel-Dabhol	920	943	22.50	20.71	24.48	24.74
11	GAIL	KG Basin Network	878	867	19.37	4.17	3.89	3.26
12	GAIL	Kochi-Kootanad-Bangalore-Mangalore	1,104	675	16.00	3.66	3.93	4.66
13	GAIL	Gujarat Regional Network	609	585	8.31	2.71	2.83	2.89
14	GAIL	Srikakulam-Angul	690	469	6.65	-	-	0.00
15	GAIL	Chainsa-Jhajjar-Hissar	455	440	13.20	1.98	2.15	2.12
16	IGGL	North-East Natural Gas Pipeline Grid	1,863	392	5.75	-	-	0.22
17	GITL	Mallavaram - Bhopal - Bhilwara - Vijaipur	1,881	365	78.25	1.92	2.07	1.53
18	RGPL	Shahdol-Phulpur	312	304	3.50	0.58	0.74	0.84
19	GAIL	Cauvery Basin Network	240	242	4.33	1.92	1.67	1.40
20	IOCL	Dadri-Panipat	132	143	20.00	4.83	5.41	4.49
21	GAIL	Mumbai Regional Network	129	125	7.04	8.14	7.69	6.59
22	AGCL	Assam Natural Gas Pipeline	105	107	2.43	1.16	1.73	1.73
23	GIGL	Bhatinda - Gurdaspur	261	101	42.42	0.06	0.08	0.10
24	GGL	Hazira-Ankleshwar	73	73	5.06	0.53	0.62	0.76
25	GAIL	Agartala Regional Network	55	65	2.00	0.92	0.69	0.67
26	GSPL	Low Pressure Gujarat Gas Grid	58	57	12.00	6.61	5.84	5.85
27	ONGC	Uran-Trombay	24	24	6.00	3.08	3.41	3.30
Total			31,287	26,353				
* Data as on 31.03.2026 Data as submitted by entities.								

Natural Gas Supplied (MMSCMD) (Pipeline Operating Length $\geq$ 500 Km)



Natural Gas Supplied (MMSCMD) (Pipeline Operating Length < 500 Km)



CHAPTER IV

Liquefied Natural Gas (LNG) Terminals

1. LNG Infrastructure: Expansion of Regasification Capacity

Liquefied Natural Gas (LNG) continues to play a critical role in meeting India's growing natural gas requirements. LNG provides access to international gas markets and complements domestic natural gas production, particularly for sectors requiring assured and flexible gas supplies.

India's LNG import infrastructure has expanded substantially over the years. From the commissioning of the country's first LNG terminal at Dahej in 2004, the infrastructure has grown to eight operational onshore LNG terminals. As of March 2026, these terminals together provide approximately 53.5 MMTPA of regasification capacity, equivalent to around 192 MMSCMD of natural gas.

Table 4.1: Operational LNG Regasification Terminals in India

LNG Terminal	State	Operator	Capacity (MMTPA)	Year Commissioned
Dahej	Gujarat	Petronet LNG Ltd.	17.5	2004
Hazira	Gujarat	Hazira LNG Pvt. Ltd.	6.0	2005
Dabhol	Maharashtra	Konkan LNG Ltd.	5.0	2013
Kochi	Kerala	Petronet LNG Ltd.	5.0	2013
Ennore	Tamil Nadu	Indian Oil LNG Pvt. Ltd.	5.0	2019
Mundra	Gujarat	GSPC LNG Ltd.	5.0	2020
Dhamra	Odisha	Adani TotalEnergies LNG	5.0	2023
Chhara	Gujarat	HPCL	5.0	2025
Total			53.5	
Source: PPAC				

The geographical distribution of terminals along India's western, southern and eastern coasts provides multiple LNG entry points and enhances the flexibility and resilience of the natural gas supply system.

The commissioning of Chhara LNG Terminal in 2025 added 5 MMTPA of capacity and took the number of operational onshore LNG terminals to eight.

2. LNG Imports: Increasing role in India's Gas supply

India's growing natural gas demand, together with the limitations of domestic production, has resulted in an increasing role for imported LNG.

According to PNGRB's assessment, India imported 34,216 MMSCM of LNG in FY 2025–26, India is consequently among the world's major LNG-importing countries.

Table 4.2: Selected LNG Statistics

Indicator	Value
Operational LNG terminals	8
Operational regasification capacity	53.5 MMTPA
Equivalent capacity	192 MMSCMD
LNG imports, FY 2025–26	34,216 MMSCM
Growth in LNG imports, from 2016-17 to 2025-26	3.4% (P.A.)
Largest terminal	Dahej – 17.5 MMTPA
New terminal commissioned	Chhara – 5 MMTPA (2025)
Sources: PPAC, LNG Imports; LNG infrastructure publications.	

Statistical Significance

The increasing LNG import requirement reflects two simultaneous developments:

1. Growth in demand for natural gas across CGD, fertiliser, industry, power and other sectors; and
2. Need to supplement domestic gas production through imported LNG.

Thus, LNG has become an important component of India's overall gas-supply portfolio rather than merely a supplementary source.

3. Regasification Capacity and Utilisation

The expansion of LNG terminals has substantially increased India's ability to receive and regasify imported LNG. However, capacity utilization varies significantly between terminals.

PNGRB's assessment reports aggregate utilization of approximately 50% in FY 2025–26 for the existing terminal network. Dahej, India's largest LNG terminal, recorded exceptionally high utilization of 91.9%, whereas several other terminals operated considerably below their installed capacity.

Table 4.3: LNG Terminal-Wise Capacity Utilisation

Terminal	Capacity (MMTPA)	Utilisation FY 2025–26
Dahej	17.5	91.9%
Hazira	6.0	27.2%
Dabhol	5.0	34.5%
Kochi	5.0	26.30%
Ennore	5.0	25.10%
Mundra	5.0	17.40%
Dhamra	5.0	34.10%
Chhara	5.0	6.2%
Total	53.5	
Source: PPAC		

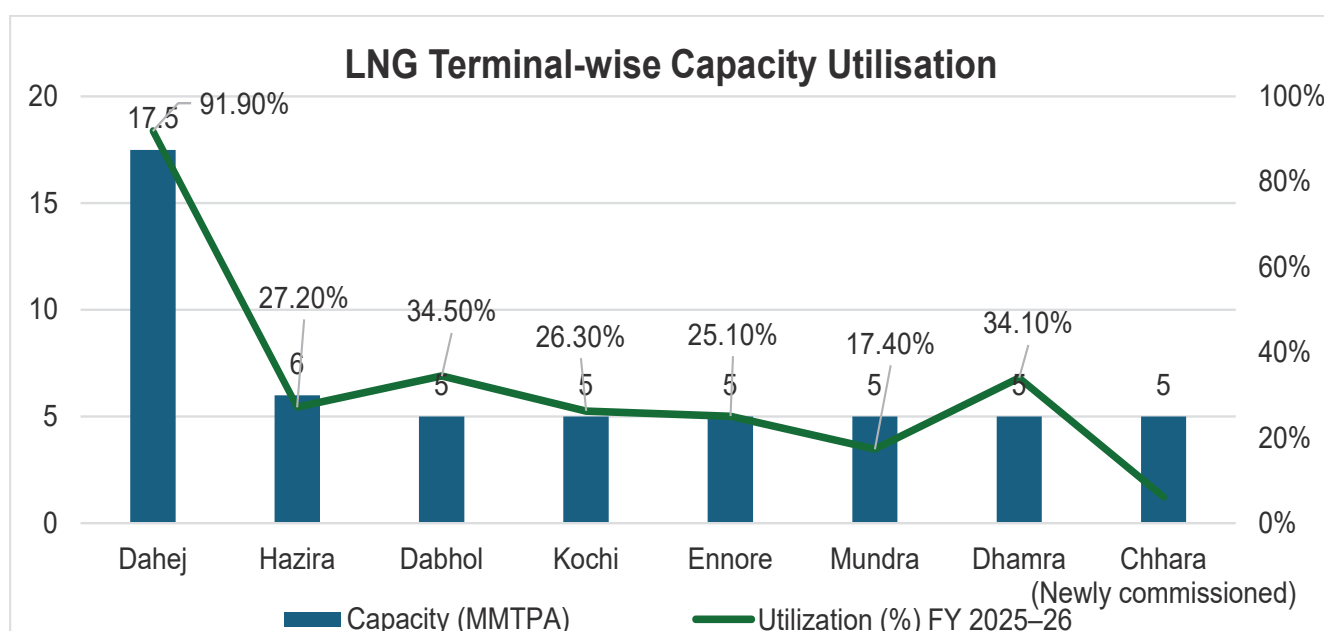
Key Observation

The data indicate that creation of regasification capacity and utilization of that capacity are two distinct dimensions of LNG-sector development.

While Dahej operates at a very high utilization level, several terminals have significant spare capacity. This variation may be associated with factors such as:

- availability and competitiveness of LNG;
- proximity to demand centres;
- pipeline connectivity and evacuation infrastructure;
- regional gas demand;
- Long term RLNG contract with fixed destination port;
- commercial arrangements and LNG contracts; and
- development stage of newer terminals.

PNGRB has accordingly highlighted the importance of effective utilization, demand assessment, pipeline connectivity and evacuation infrastructure while planning further LNG capacity.



4. Expansion of Existing Terminals and Regulatory Development

Expansion of existing facilities is also being pursued. PNGRB's infrastructure assessment identifies expansion at Dahej and Dabhol, together with additional LNG terminal projects. The assessment identifies further capacity additions as part of the LNG infrastructure expected towards 2030. Dahej terminal has already commissioned an additional capacity of 5 MMTPA in year 2026.

The development of LNG infrastructure has also been accompanied by strengthening of the regulatory framework. PNGRB's LNG-related work has focused on issues including terminal registration, access, utilisation and integration of LNG terminals with the wider natural gas transmission system.

5. Pipeline Network connected with the LNG terminals

Table 4.4: Pipelines Network connected with the LNG terminals

Location	Operated By	Connected Pipeline Network	Design Capacity (MMSCMD)	Operator
Dahej	Petronet LNG Ltd.	HVJ (<i>Hazira-Vijaipur-Jagdishpur</i>)	107	GAIL
		DVPL (<i>Dahej-Vijaipur</i>) (DVPL1&2 parallel loop line)	77	GAIL
		DUPL (<i>Dahej-Uran</i>)- DPPL (<i>Dabhol-Panvel</i>) (<i>Dahej-Uran-Panvel-Dabhol</i>)	19.5	GAIL
		GSPL Network (<i>Gujarat State Gas Grid</i>)	43	GSPL (GSPC)
Dabhol	Konkan LNG	DUPL (<i>Dahej-Uran</i>)	19.9	GAIL
		DPPL (<i>Dabhol-Panvel</i>)		GAIL
		DBPL (<i>Dabhol-Bengaluru</i>)	16	GAIL
Dhamra	Adani Total Private Ltd.	JHBDPL (<i>Jagdishpur-Haldia-Bokaro-Dhamra</i>)	16	GAIL
Hazira	Shell Energy India	GSPL Network (<i>Gujarat State Gas Grid</i>)	43	GSPL (GSPC)
Chhara	HPCL LNG Ltd.	GSPL Network (<i>Gujarat State Gas Grid</i>) through Chaara -Lothput P/L	43	GSPL (GSPC)
Mundra	GSPC & Adani Group	Mundra-Anjar NG P/L	12	GSPL (GSPC & Adani)
Kochi	Petronet LNG Ltd.	KKBMPL (<i>Kochi-Kootanad-Bengaluru-Mangaluru</i>)	16	GAIL
Ennore	Indian Oil LNG (IOLNG)	ETBPNMTPL (<i>Ennore-Thiruvallur Bengaluru-Puducherry-Nagapatinam-Madurai-Tuticorin</i>)	84.7	IOCL

6. LNG Sector – Statistical Snapshot

LNG IN INDIA: FY 2025–26 AT A GLANCE

8 — Operational onshore LNG terminals

53.5 MMTA — Operational regasification capacity

192 MMSCMD — Equivalent regasification capacity

34,216 MMSCM — LNG imports in FY 2025–26

3.86% — Growth in LNG imports in from FY 2016-17 to FY 2025-26

6.2% to 91.9% — Utilization of terminals in FY 2025–26

5 MMTPA — Chhara terminal commissioned in 2025

7. Overall Perspective

Going forward, the statistical assessment of LNG should therefore move beyond installed capacity and focus on the relationship:

LNG Imports → Regasification → Pipeline Connectivity → Gas Demand → Capacity Utilization

This integrated perspective would provide a more meaningful assessment of the contribution of LNG infrastructure to the development of India's natural gas economy.



CHAPTER V

Petroleum & Petroleum Product Pipeline Network

Petroleum & Petroleum Product Pipelines (PPPL) constitute an important component of India's downstream petroleum infrastructure, providing an efficient and dependable mode for transportation of petroleum products from refineries and supply terminals to distribution and consumption centres. The pipeline network facilitates movement of products over long distances and forms an integral part of the country's logistics infrastructure for meeting the requirements of a geographically dispersed market.

The Petroleum and Natural Gas Regulatory Board (PNGRB), in exercise of its regulatory mandate, maintains and publishes statistical information on the PPPL sector through its periodic reports. The information provides a consolidated view of the authorised and operational pipeline network, pipeline capacity, throughput and capacity utilisation. These statistics enable monitoring of the development and utilisation of the regulated pipeline infrastructure and provide an important evidence base for understanding the evolving petroleum-product transportation network.

During FY 2025–26, the PPPL network continued to expand and operate as a significant transportation system for petroleum products. The network comprises pipelines designed for transportation of multi-products, LPG and Aviation Turbine Fuel (ATF), connecting major refining, storage, terminal and consumption locations.

The operational pipeline network, viewed alongside the authorised network, indicates the extent of infrastructure brought into service. Pipeline capacity reflects available transportation capability, while throughput represents the volume transported during the reporting period. Their relationship, expressed as capacity utilisation, provides a useful statistical indicator of infrastructure utilisation.

The FY 2025–26 statistics provide a factual snapshot of the PPPL network's scale, operational spread, capacity and utilisation under PNGRB's regulatory framework, covering major public-sector and other authorised entities. They also establish a useful baseline for tracking the future development of pipeline-based petroleum product transportation.

1. Petroleum & Petroleum Product Pipelines (PPPL) — Key Insights

As at 31 March 2026, the PPPL network comprised 15,198 Km of authorised pipeline length, of which 10,662 Km was operating, representing approximately 70.2% of the authorised network.

Total reported PPPL throughput is 36.62 MMTA during FY 2025–26.

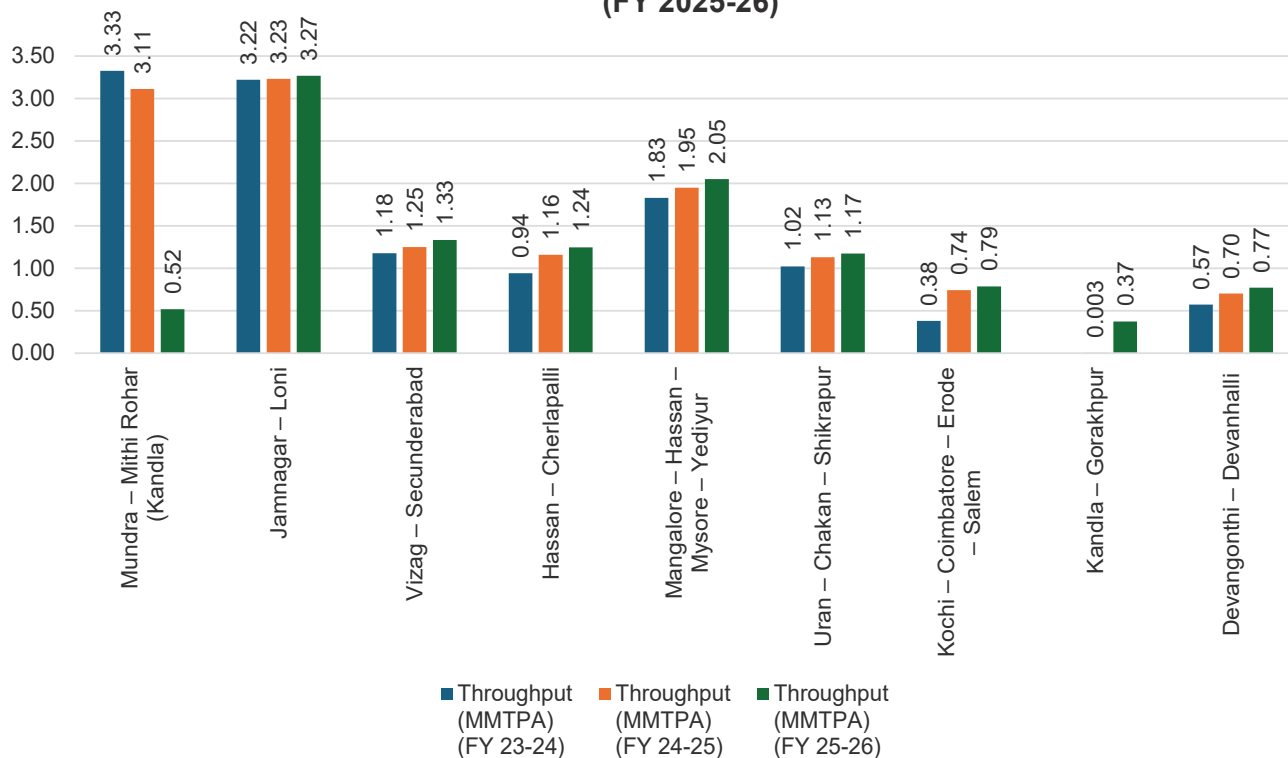
LPG pipelines continued to provide an important dedicated transportation network, with FY 2025–26 throughput of 10.74 MMTA across the pipelines. The Jamnagar–Loni LPG pipeline recorded the highest throughput at 3.27 MMTA, followed by Mangalore–Hassan–Mysore–Yedyur at 2.05 MMTA.

The PPPL data therefore indicate a strong increase in product movement during FY 2025–26, particularly through multi-product pipelines, even though a part of the authorised network was yet to become operational.

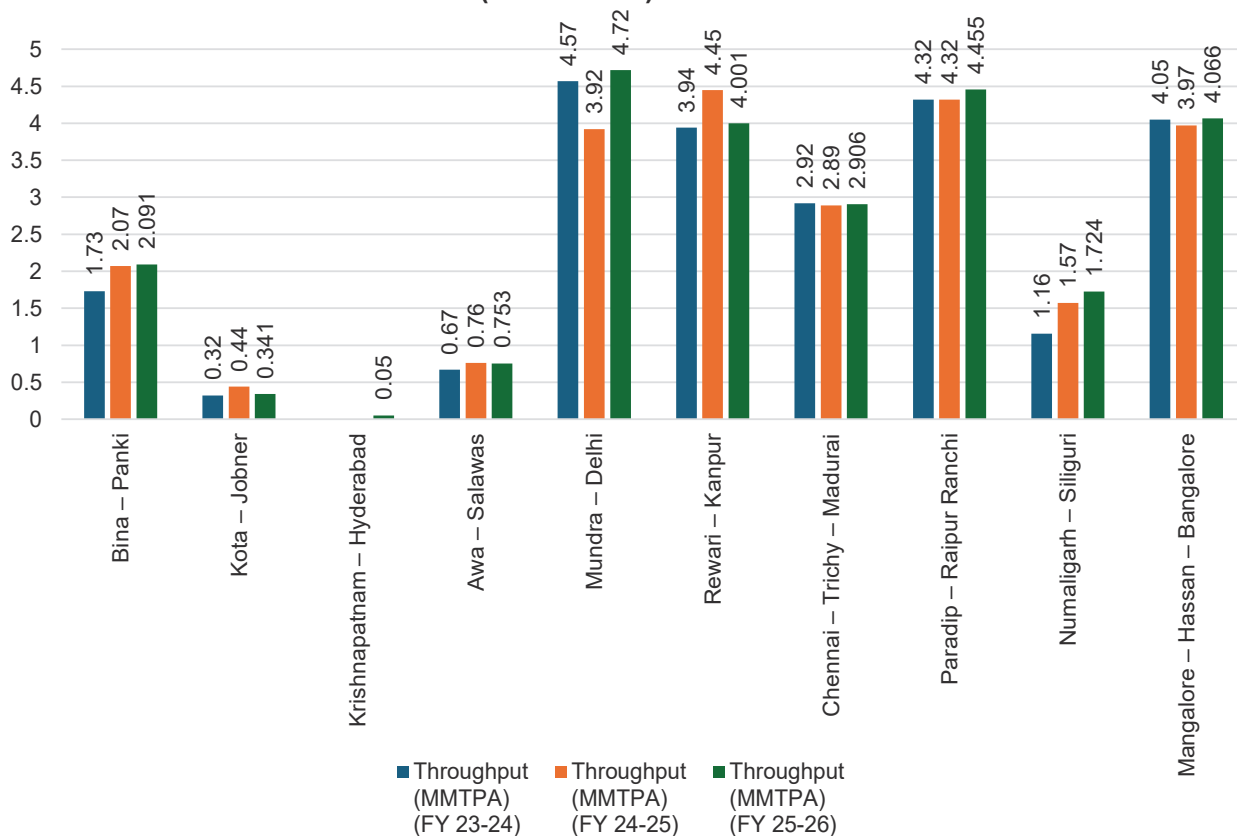
Table 5.1: Throughput details of PPPL (Operational and Partially Commissioned Pipelines)

Throughput details of PPPL (Operational and Partially Commissioned Pipelines)									
S. No.	Entity	Pipeline Name	Product	Authorised Length* (Km)	Operating Length* (Km)	Authorised/ Determined Capacity* (MMTPA)	Throughput (MMTPA) (FY 23-24)	Throughput (MMTPA) (FY 24-25)	Throughput (MMTPA) (FY 25-26)
1	APSEZ	Mundra – Mithi Rohar (Kandla)	LPG	89	92	6.75	3.33	3.11	0.52
2	GAIL	Jamnagar – Loni	LPG	2,551	1,427	6.50	3.22	3.23	3.27
3	GAIL	Vizag – Secunderabad	LPG	616	609	1.33	1.18	1.25	1.33
4	HPCL	Hassan – Cherlapalli	LPG	680	650	2.20	0.94	1.16	1.24
5	HPCL	Mangalore – Hassan – Mysore – Yedyur	LPG	356	356	3.10	1.83	1.95	2.05
6	HPCL	Uran – Chakan – Shikrapur	LPG	165	171	1.16	1.02	1.13	1.17
7	KSPPL	Kochi – Coimbatore – Erode – Salem	LPG	458	203	1.53	0.38	0.74	0.79
8	IHBL	Kandla – Gorakhpur	LPG	2,757	1,020	8.25	-	0.003	0.37
9	IOCL	Devangonthi – Devanhalli	ATF	36	36	0.66	0.57	0.70	0.77
10	BPCL	Bina – Panki	Multi-Product	355	356	3.49	1.73	2.07	2.09
11	BPCL	Kota – Jobner	Multi-Product	210	211	2.75	0.32	0.44	0.34
12	BPCL	Krishnapatnam – Hyderabad	Multi-Product	455	425	4.40	-	-	0.05
13	HPCL	Awa – Salawas	Multi-Product	92	93	2.34	0.67	0.76	0.75
14	HPCL	Mundra – Delhi	Multi-Product	1,334	1,289	6.90	4.57	3.92	4.72
15	HPCL	Rewari – Kanpur	Multi-Product	440	443	7.98	3.94	4.45	4.00
16	IOCL	Chennai – Trichy – Madurai	Multi-Product	944	683	4.50	2.92	2.89	2.91
17	IOCL	Paradip – Raipur Ranchi	Multi-Product	1,145	1,073	5.00	4.32	4.32	4.46
18	OIL	Numaligarh – Siliguri	Multi-Product	660	654	5.50	1.16	1.57	1.72
19	PMHBL	Mangalore – Hassan – Bangalore	Multi-Product	362	363	5.60	4.05	3.97	4.07
Total				13,704	10,154				
* Data as on 31.03.2026 Data as submitted by entities.									

LPG Pipelines Throughput (MMTPA) (FY 2025-26)



ATF & Multi-Product Pipelines Throughput (MMTPA) (FY 2025-26)



CHAPTER VI

Technical Standards and Safety

1. Safety and Integrity of Petroleum & Natural Gas Infrastructure

Safety and technical integrity constitute a fundamental pillar of PNGRB's regulatory framework. The rapid expansion of natural gas pipelines, City Gas Distribution (CGD) networks, LNG facilities and petroleum product pipelines has increased the scale and geographical spread of regulated infrastructure, making safe design, construction, operation, maintenance and emergency preparedness essential for sustainable sectoral growth.

PNGRB has prescribed Technical Standards and Specifications (T4S) and Integrity Management System (IMS) requirements for relevant regulated entities. These standards provide a structured framework for ensuring that infrastructure is designed and operated in accordance with prescribed technical and safety requirements throughout its lifecycle.

In addition, the Emergency Response and Disaster Management Plan (ERDMP) framework provides an important mechanism for preparedness and coordinated response to emergencies across regulated installations. Thus, PNGRB's safety oversight encompasses three complementary dimensions:

Technical Standards → Integrity Management → Emergency Preparedness

The effectiveness of this framework is reflected not merely in the number of audits undertaken, but ultimately in the prevention of incidents, reduction of consequences and continuous strengthening of safety practices.

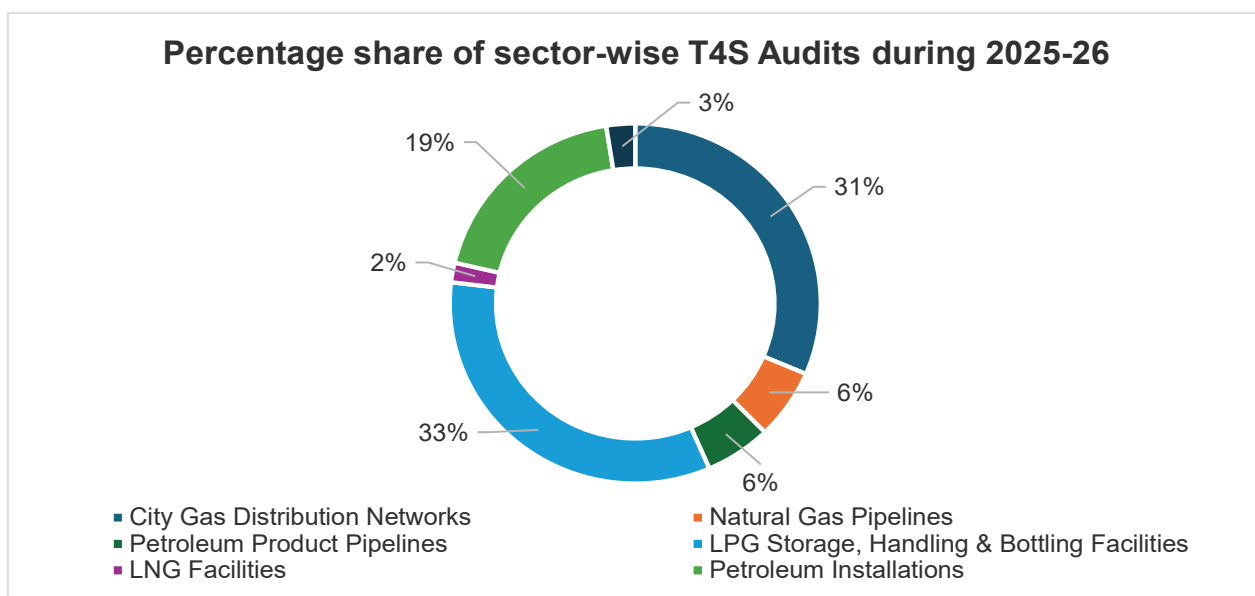
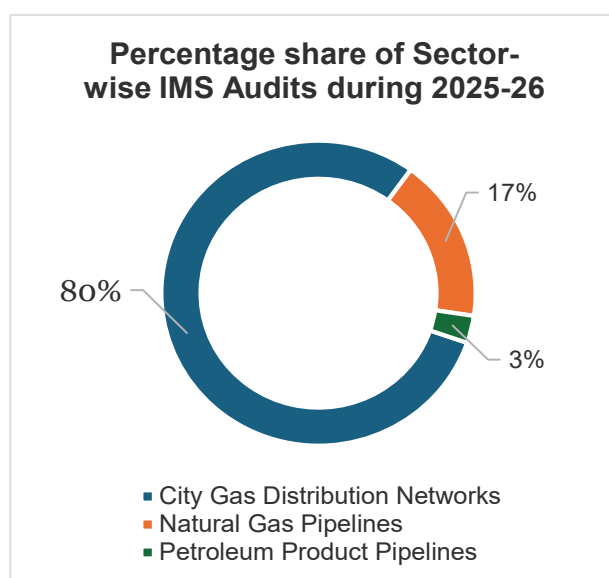
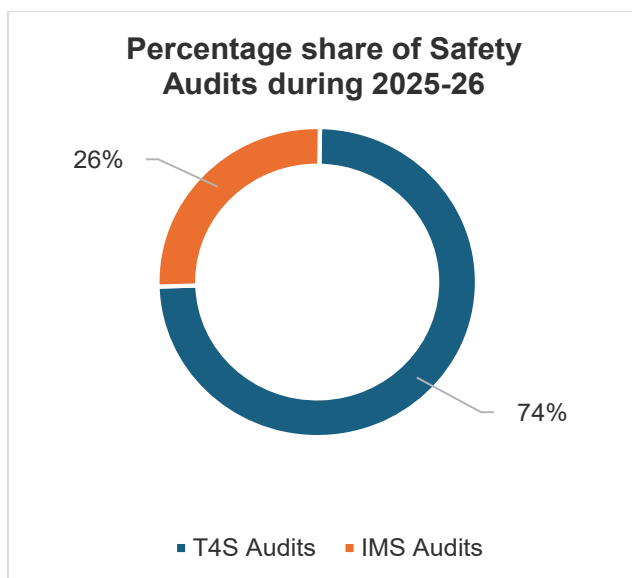
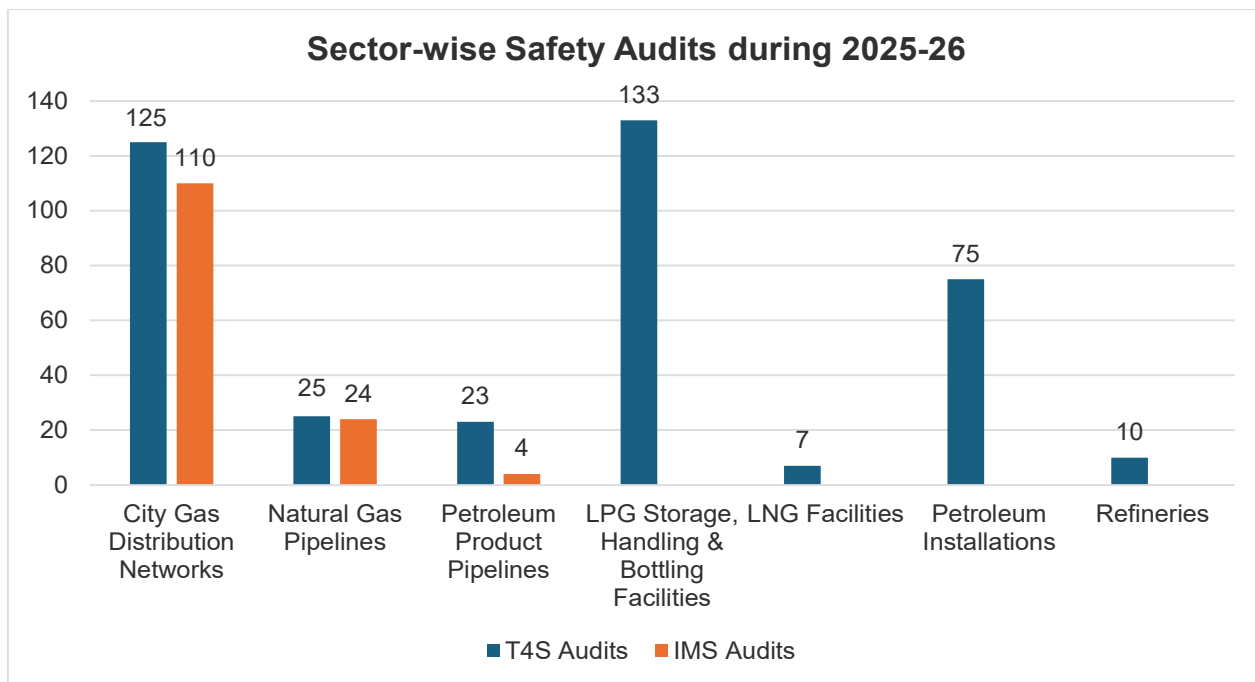
2. PNGRB's Safety Oversight during 2025–26

During FY 2025–26, PNGRB undertook extensive technical and safety oversight across the regulated petroleum and natural gas infrastructure.

A total of 536 T4S/IMS audits were undertaken during the year, comprising 398 T4S audits and 138 IMS audits. In addition, 319 ERDMP audits covering installations were undertaken, taking the overall audit activity to 855.

Table 6.1: Technical, Integrity and Emergency Preparedness Audits, 2025–26

S. No.	Sector	T4S Audits	IMS Audits	T4S + IMS	ERDMP Audits*
1	City Gas Distribution Networks	125	110	235	—
2	Natural Gas Pipelines	25	24	49	—
3	Petroleum Product Pipelines	23	4	27	—
4	LPG Storage, Handling & Bottling Facilities	133	0	133	—
5	LNG Facilities	7	0	7	—
6	Petroleum Installations	75	0	75	—
7	Retail Outlets	0	0	0	—
8	Refineries	10	0	10	—
9	ERDMP – All Installations	—	—	—	319
Total		398	138	536	319
Grand Total		536		855	
*ERDMP audits are reported separately and cover all installations.					



Key observations

The audit profile demonstrates the breadth of PNGRB's technical and safety oversight:

- CGD networks accounted for 235 T4S/IMS audits, the highest among the individual sectors, reflecting the extensive geographical spread of CGD infrastructure.
- LPG Storage, Handling & Bottling Facilities accounted for 133 T4S audits, followed by Petroleum Installations with 75.
- Natural gas pipelines underwent 49 T4S/IMS audits, while petroleum product pipelines underwent 27.
- The 138 IMS audits indicate increasing emphasis on systematic management of integrity and safety, in addition to compliance with technical standards.
- The 319 ERDMP audits provide a separate layer of preparedness and emergency-response oversight across installations.

Taken together, the audit programme represents a comprehensive regulatory mechanism extending from technical compliance and asset integrity to emergency preparedness.

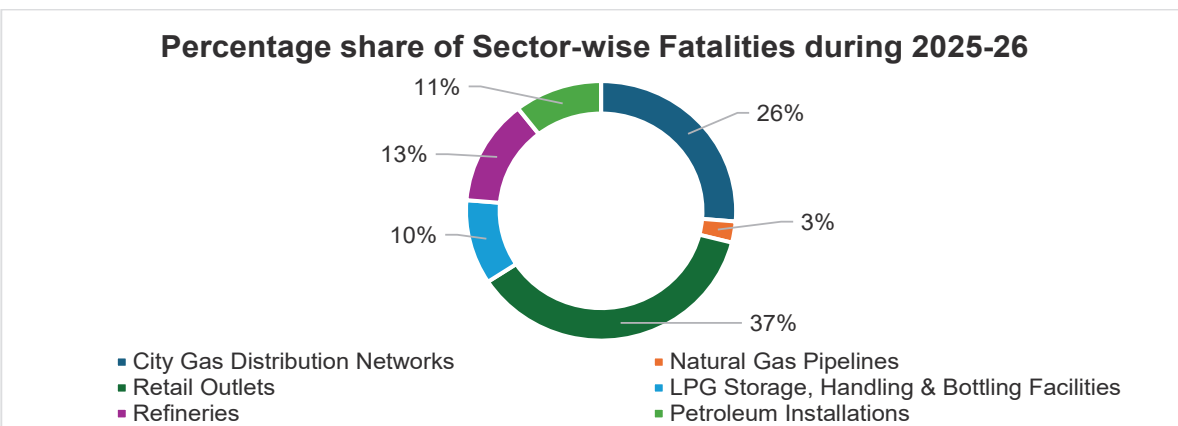
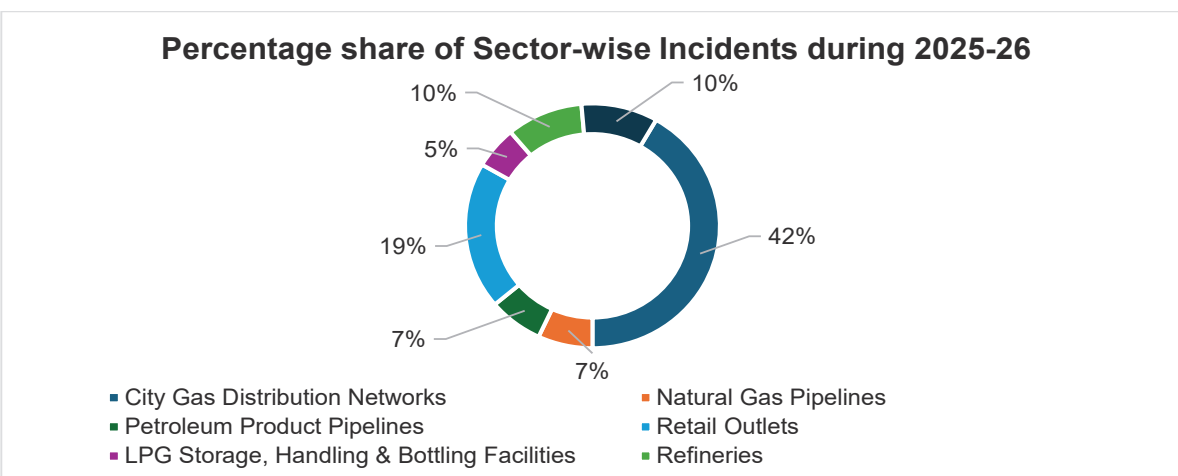
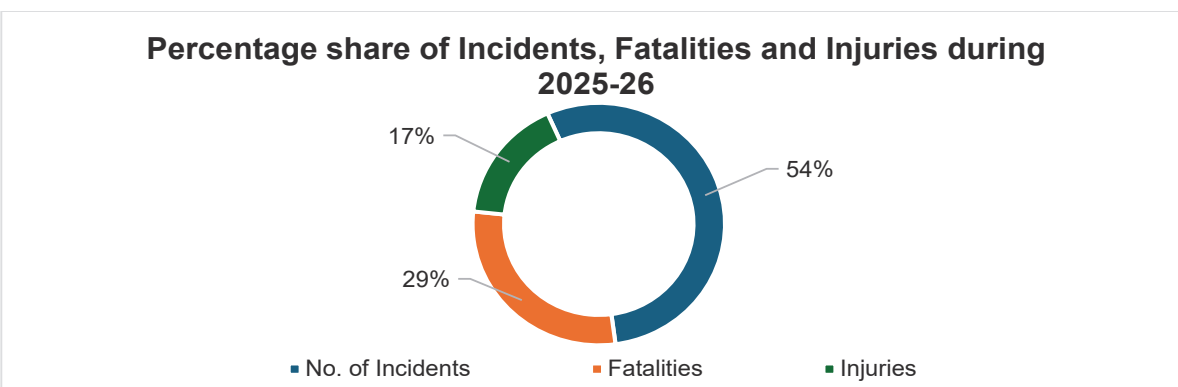
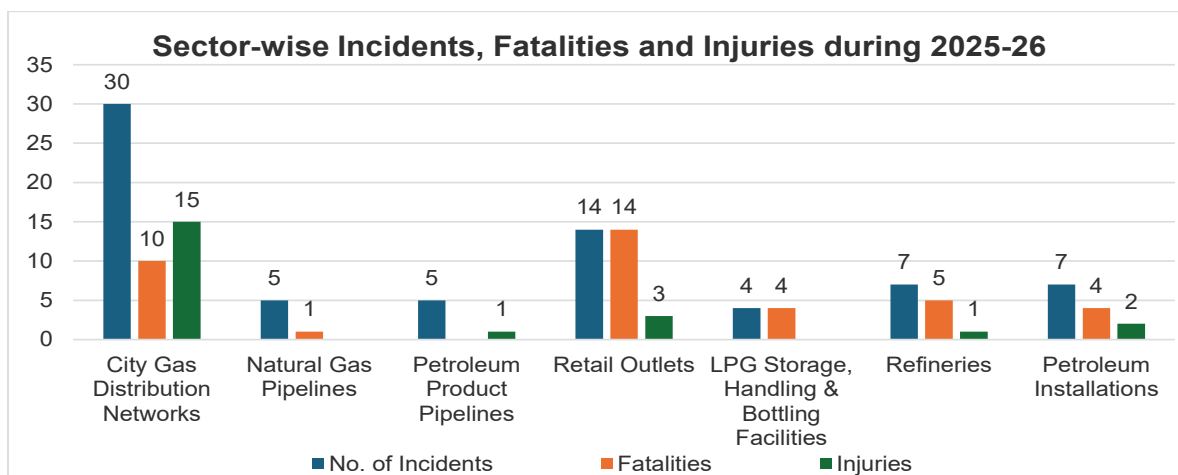
3. Safety Performance – Incidents, Fatalities and Injuries

While audits provide an important measure of regulatory oversight, safety performance is ultimately reflected in the occurrence and consequences of incidents.

During FY 2025–26, 72 incidents were reported across the sectors covered in the supplied data, involving 38 fatalities and 22 injuries.

Table 6.2: Sector-wise Incidents, Fatalities and Injuries, FY 2025–26

Sector	No. of Incidents	No. of Fatalities	No. of Injuries
City Gas Distribution Networks	30	10	15
Natural Gas Pipelines	5	1	0
Petroleum Product Pipelines	5	0	1
LNG Facilities	0	0	0
Retail Outlets	14	14	3
LPG Storage, Handling & Bottling Facilities	4	4	0
Refineries	7	5	1
Petroleum Installations	7	4	2
Total	72	38	22



4. Analytical Assessment of Safety Performance

The incident data present several important messages for safety management and regulatory attention.

CGD – highest number of incidents

CGD networks recorded the highest number of incidents (30) among the reported sectors, accounting for about 42% of all reported incidents. They also recorded 10 fatalities and 15 injuries.

This needs to be viewed in the context of the extensive expansion of CGD networks and their operation in densely populated areas. The presence of underground pipelines and associated installations in residential, commercial and traffic-intensive areas increases the importance of third-party damage prevention, leak detection, excavation control, emergency response and public awareness.

Retail Outlets – high fatality consequence

Retail Outlets recorded 14 incidents and 14 fatalities. Although the number of incidents were lower than in CGD, their reported consequences were particularly severe.

This highlights the need for continued attention to fire prevention, safe handling of petroleum products, electrical safety, vehicle movement and emergency preparedness at retail outlets.

Pipelines – relatively limited reported consequences

Natural gas pipelines recorded 5 incidents, 1 fatality and no injuries, while petroleum product pipelines recorded 5 incidents, no fatalities and 1 injury.

The relatively limited reported human consequences in the pipeline sectors underline the importance of preventive integrity management, surveillance and emergency preparedness. Nevertheless, even isolated pipeline incidents can have significant consequences because of the hazardous nature of the transported products and the potential exposure of surrounding populations.

LNG facilities – no reported incident

No incident, fatality or injury was reported for LNG facilities during FY 2025–26. This provides a positive safety signal, although continued vigilance is essential because LNG facilities involve cryogenic and highly flammable materials.

5. Linking Audit Activity with Safety Outcomes

The two sets of statistics together provide a useful framework for understanding PNGRB's safety oversight.

Audit Activity

T4S → IMS → ERDMP → Prevention & Preparedness → Incident Reduction → Protection of Life, Property & Environment

The 855 audits undertaken during FY 2025–26 demonstrate the scale of regulatory oversight. At the same time, the occurrence of 72 incidents with 38 fatalities and 22 injuries indicates that continued improvement in preventive safety management remains necessary.

It is inappropriate to assess safety performance solely on the basis of the number of audits. The greater objective is to translate audit findings into corrective actions, strengthened asset integrity, improved operating practices and prevention of recurrence.

6. Safety Performance: Regulatory Perspective

The audit and incident statistics together provide an important perspective on the effectiveness and continuing evolution of safety management across the regulated sector.

The 855 audits undertaken during 2025–26, comprising 536 T4S/IMS audits and 319 ERDMP audits, reflect PNGRB's continuing emphasis on technical compliance, asset integrity and emergency preparedness. At the same time, the reported 72 incidents, including 38 fatalities and 22 injuries, underline the importance of sustained preventive action and continuous strengthening of safety practices.

The sectoral pattern also provides useful insights. CGD networks recorded the highest number of incidents, consistent with the extensive geographical spread of the network and its interface with densely populated areas. Retail Outlets, while reporting fewer incidents than CGD, recorded relatively high consequences in terms of fatalities. The comparatively limited number of incidents and consequences reported for natural gas and petroleum product pipelines reflects the importance of continued integrity management and preventive surveillance.

These statistics are being viewed by PNGRB not merely as measures of compliance, but also as inputs for strengthening preventive safety management, identifying recurring risk areas and promoting continuous improvement across regulated entities.

7. Strengthening the Safety Framework

PNGRB continues to reinforce safety management through a combination of Technical Standards & Specifications, Integrity Management Systems, Emergency Response and Disaster Management Plans, audits, inspections, and incident analysis.

The experience and data emerging from the regulated sector are being utilized to strengthen focus on:

- preventive maintenance and pipeline integrity
- timely identification and rectification of leaks and defects
- prevention of third-party damage, particularly to underground CGD networks
- emergency preparedness and response capabilities
- adoption of digital technologies for monitoring and early detection; and
- Systematic analysis of incidents and dissemination of lessons learnt.

The emphasis is progressively shifting towards proactive and risk-based safety management, while maintaining compliance with prescribed technical and safety standards.

8. Way Forward

PNGRB's continuing focus is to foster a safety culture based on prevention, preparedness, accountability, and continuous improvement. The statistical evidence presented in this chapter provides an important basis for monitoring sectoral safety performance and identifying areas requiring closer regulatory attention.

Going forward, PNGRB will continue to strengthen technical oversight, integrity management, emergency preparedness, incident analysis and safety-performance benchmarking, with greater use of data and digital technologies wherever appropriate.

The overarching objective remains to ensure that the existing and expanding petroleum and natural gas infrastructure is accompanied by high standards of safety, reliability and protection of life, property and the environment.

9. Safety Message

From compliance to prevention; from inspection to integrity; and from incident reporting to continuous learning.

PNGRB's technical and safety oversight is directed towards ensuring that India's expanding petroleum and natural gas infrastructure operates with integrity, resilience and the highest practicable standards of safety.



CHAPTER VII

Compressed Biogas Integration in India's Gas Economy

Compressed Biogas (CBG) is emerging as an important component of India's renewable-gas and circular-economy transition, linking waste-to-energy, energy security and decarbonisation. Government initiatives led by the Ministry of Petroleum & Natural Gas (MoPNG)—including SATAT, GOBARdhan and the CBG–CGD Synchronisation framework—have progressively created an enabling ecosystem for CBG production, procurement, blending and utilisation.

FY 2025–26 marked an important transition from project development towards measurable market absorption. CBG sales reached 120.29 MMSCM, equivalent to 0.99% of CNG (T) and DPNG sales, against the first-year 1% CBG Blending Obligation (CBO). Monthly CBG sales rose from 0.211 MMSCMD in April 2025 to 0.620 MMSCMD in March 2026, indicating strong acceleration during the year.

Key FY 2025–26 Indicators

Table 7.1: Key CBG Indicators – FY 2025–26

Indicator	FY 2025–26
CNG + DPNG sales	12,049 MMSCM
CBG sales	120.29 MMSCM
CBG blending achieved	0.998%
Mandated CBO	1.00%
Achievement of mandated level	99.8%
Functional CBG plants	207
Source: CBG Sales from CBG-CGD Synchro operator.	

FY 2025–26 marked CBG's transition from capacity creation towards market integration. The policy architecture has strengthened, sales have accelerated, and the principal next-stage challenge is to convert installed CBG capacity into connected, reliable and commercially integrated supply to the CGD network.

1. Policy and Institutional Ecosystem

The CBG ecosystem has evolved through a combination of market creation, waste-to-energy initiatives, and gas-network integration. SATAT has provided the broad framework for development and procurement of CBG, while GOBARdhan promotes conversion of organic waste and biomass into useful products including CBG and bio-manure. The CBG–CGD Synchronisation framework and subsequent pipeline-infrastructure measures are intended to make CBG physically and commercially compatible with the expanding gas distribution network.

Table 7.2: Key Government Initiatives Supporting CBG Development

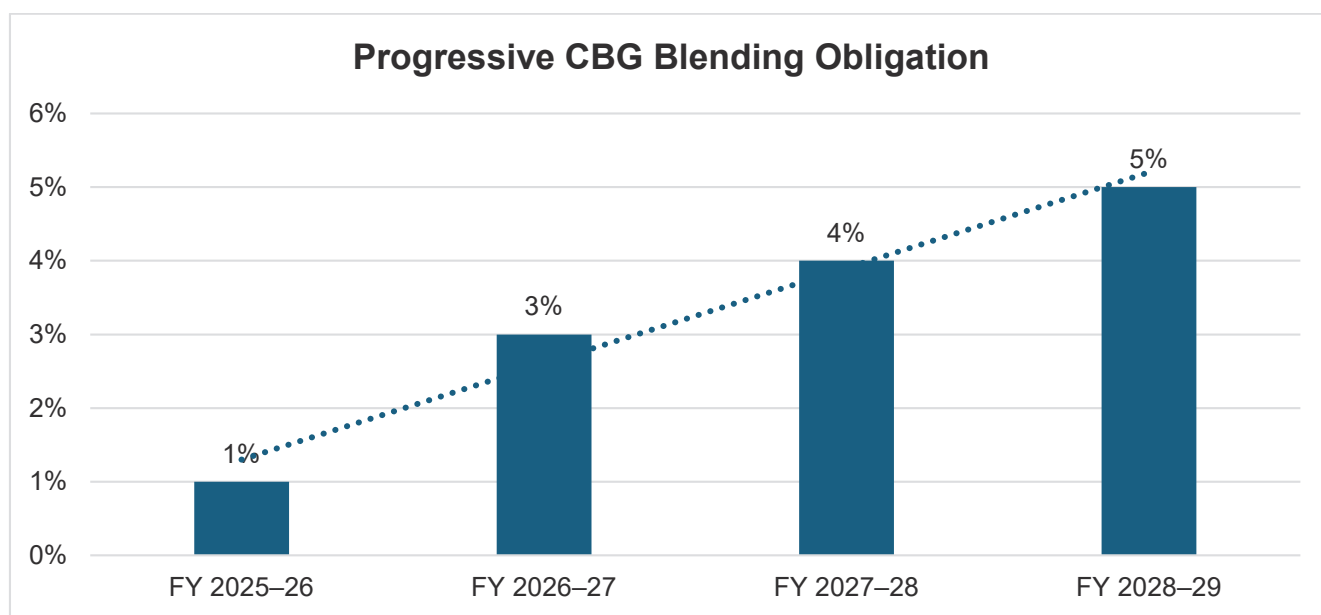
Policy / Initiative	Strategic relevance to CBG
SATAT	Creates an offtake-oriented framework and supports development of CBG as a transport and gas-sector fuel.
GOBARdhan	Promotes conversion of organic waste/biomass into CBG and bio-manure, supporting circular-economy outcomes.

Policy / Initiative	Strategic relevance to CBG
CBG Blending Obligation	Creates progressively expanding demand from CNG (T) and PNG (D) segments of CGD networks.
CBG–CGD Synchronisation	Facilitates coordination among CBG producers, CGD entities and pipeline operators.
DPI Scheme for CBG Offtake	Provides a policy mechanism to facilitate pipeline infrastructure for CBG offtake.

Progressive CBG Blending Obligation (CBO)

Table 7.3: CBG Blending Obligation from 2025–26 to 2028–29

Financial Year	CBO
FY 2025–26	1%
FY 2026–27	3%
FY 2027–28	4%
FY 2028–29	5%



The step-up from 1% to 5% makes CBG market integration progressively more important. The FY 2025–26 achievement of 0.998% indicates that the initial obligation was almost reached, the higher obligations from FY 2026–27 onward require a substantially larger and more dependable supply base.

PNGRB's Facilitation Role

- Monitoring CBG procurement, utilization and blending by CGD entities.
- Facilitating CBG–CGD pipeline connectivity and coordination among producers, CGD entities and pipeline operators.
- Developing a structured CBG information base covering plant status, connectivity, offtake and sales.
- Supporting market integration so that CBG production is linked with actual gas demand rather than measured only by number of projects.

2. CBG Infrastructure: From Plants to Network Connectivity

The FY 2025–26 data indicate that the principal infrastructure challenge is no longer only the creation of CBG plants but their integration with the natural-gas distribution network. Of 207 functional plants, only 24 (11.6%) were already connected to pipelines, while 148 (71.5%) had no pipeline connectivity planned. The under-construction pipeline shows a similar readiness gap.

Table 7.4: Connectivity Status of CBG Plants

Connectivity status	Functional plants	Share of Functional Plants (%)	Under-construction plants	Share of Under-Construction Plants (%)
Already connected	24	11.6%	2	0.6%
Connectivity in progress	15	7.2%	17	5.2%
Proposals initiated	20	9.7%	52	15.9%
Not planned yet	148	71.5%	257	78.4%
Total	207	100%	328	100%

- Only 11.6% of functional CBG plants were already connected to a pipeline.
- 71.5% of functional plants had no pipeline connectivity planned at the time of reporting.
- Among under-construction plants, only 0.6% were already connected, while 78.4% had no connectivity planned.
- The connectivity gap is therefore a network-integration issue as much as a production issue.

3. Offtake Pattern: Cascade-led Market

Table 7.5: CBG Plants and Offtake – Mode-wise Distribution

Offtake mode	Plants	Offtake (SCMD)	Share
Cascade	54	1,30,506	65.70%
Standalone	9	50,400	25.37%
Pipeline	11	17,734	8.93%
Total	74	1,98,640	100%

The offtake data received for 74 functional plants show continued dependence on logistics-led movement. Cascade transport accounted for 65.7% of reported offtake, while pipeline offtake accounted for only 8.9%. Thus, 63 of the 74 plants relied on cascade or standalone arrangements rather than pipeline offtake.

4. Market Absorption and Entity-wise Performance

CBG Sales Momentum

Table 7.6: Average CBG Sales from April 25 to March 26

Month	Average CBG Sales	
	SCMD	MMSCMD
Apr-25	2,11,000	0.211
May-25	2,25,000	0.225
Jun-25	2,32,000	0.232
Jul-25	2,00,000	0.200
Aug-25	2,28,000	0.228
Sep-25	2,07,000	0.207
Oct-25	2,47,000	0.247
Nov-25	3,04,000	0.304
Dec-25	3,75,000	0.375
Jan-26	4,79,000	0.479
Feb-26	5,73,000	0.573
Mar-26	6,20,000	0.620

The average CBG sales during FY 2025-26 is 0.321 MMSCMD. March 2026 sales were nearly 2.94 times April 2025 sales. The strongest acceleration occurred from October 2025 onward, with monthly sales rising from 0.304 MMSCMD in November 25 to 0.620 MMSCMD in March 26.

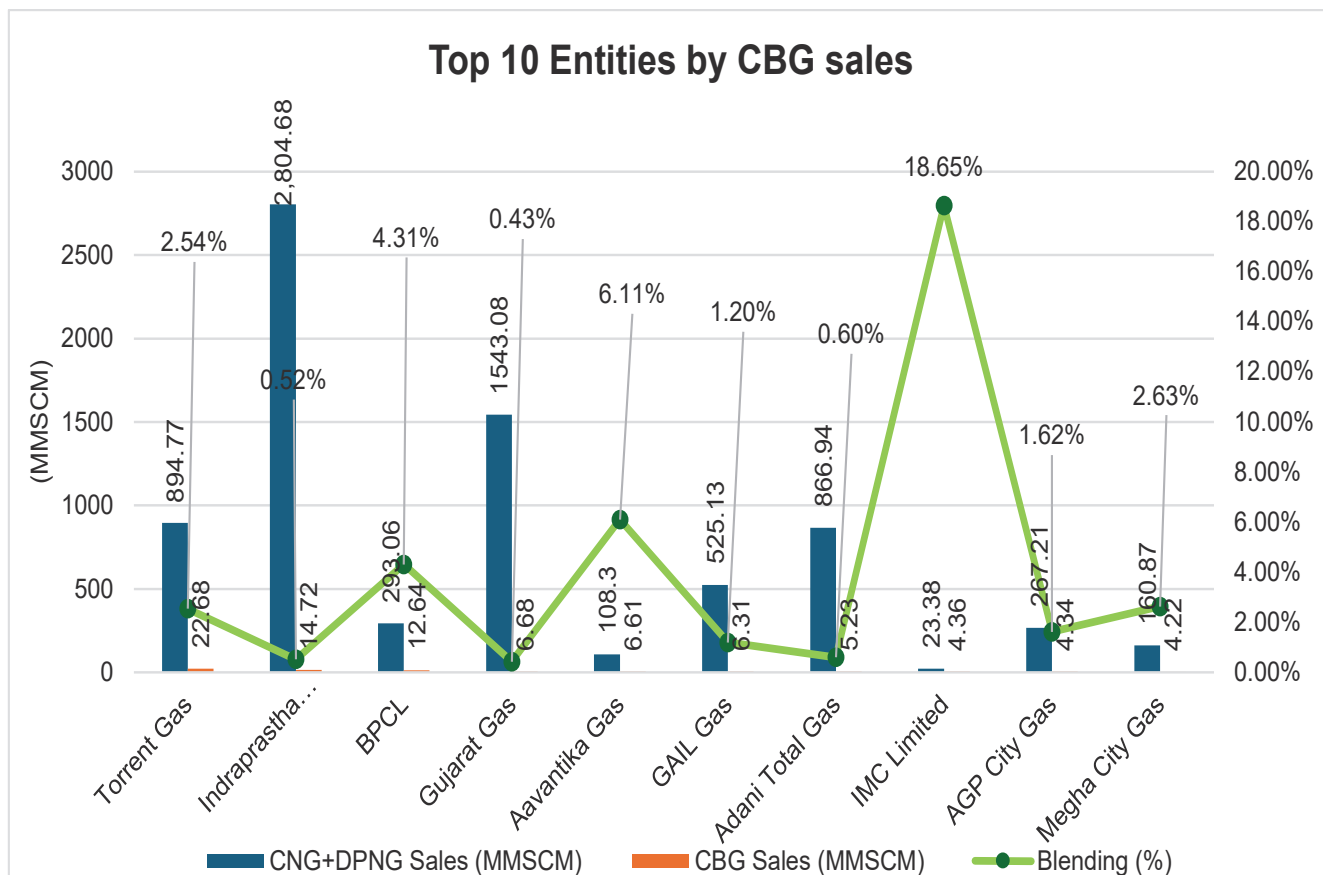
Entity-wise CBG Sales (Top 10) and Blending

Table 7.7: Top 10 Entities by CBG sales

Rank	Entity	CNG+DPNG Sales (MMSCM)	CBG Sales (MMSCM)	Blending %
1	Torrent Gas	894.77	22.68	2.54
2	Indraprastha Gas Ltd	2,804.68	14.72	0.52
3	BPCL	293.06	12.64	4.31
4	Gujarat Gas	1543.08	6.68	0.43
5	Aavantika Gas	108.30	6.61	6.11
6	GAIL Gas	525.13	6.31	1.20
7	Adani Total Gas	866.94	5.23	0.60
8	IMC Limited	23.38	4.36	18.65
9	AGP City Gas	267.21	4.34	1.62
10	Megha City Gas	160.87	4.22	2.63

Source: CBG Sales from CBG-CGD Synchro operator.

The top five entities account for 63.33 MMSCM CBG sales. The data also show a pronounced difference between scale of gas sales and blending intensity: smaller-volume entities can record high blending ratios, while some large-volume entities have lower blending percentages.



5. Analytical Assessment: The Next Phase of CBG Development

From Plant Creation to Commercial Integration

The FY 2025–26 evidence suggests that CBG is moving into a new phase. The first phase was characterized by project creation and capacity development; the next phase must be judged by functional operation, reliable offtake, network connectivity and sustained blending. A plant that is operational but not connected to the gas network may still require cascade logistics, limiting the efficiency and scalability of market absorption.

Table 7.8: Key CBG Sector Indicators and Strategic Implications

Dimension	FY 2025–26 signal	Strategic implication
Market absorption	120.29 MMSCM CBG sales	Demand is emerging and can support scale-up.
Blending	0.998% vs 1% CBO	Initial obligation nearly achieved; higher targets require acceleration.
Sales momentum	0.211 → 0.620 MMSCMD	Strong second-half growth provides a positive base.
Pipeline integration	24/207 functional plants connected	Connectivity is a major bottleneck.
Offtake mode	65.7% cascade; 8.9% pipeline	Road-based logistics remain dominant.

Dimension	FY 2025–26 signal	Strategic implication
Concentration	Top 5 = 52.66% of CBG sales	Market participation is significant but concentrated.

Priority Areas for FY 2026–27 and Beyond

- Accelerate pipeline connectivity for functional CBG plants, especially those located within or close to existing CGD networks.
- Integrate connectivity planning at the project-conception stage for new CBG plants so that production capacity and offtake infrastructure develop together.
- Promote a shift from cascade-dependent offtake towards pipeline injection wherever technically and economically feasible.
- Use structured data to identify plants with high production potential but weak market access and GAs where CBG integration can materially support blending compliance.
- Monitor entity-wise blending performance against the progressively increasing CBO rather than relying only on aggregate national achievement.

6. Conclusion

CBG has established a meaningful position within India's emerging renewable-gas ecosystem. FY 2025–26 was significant not simply because the number of plants increased, but because CBG sales demonstrated a clear upward trajectory and the first blending obligation was approached closely. The next stage, however, will require a stronger alignment between production, offtake infrastructure and CGD demand.

The central statistical message is therefore one of transition: from capacity creation to commercial and network integration. With the CBO rising from 1% in FY 2025–26 to 3%, 4% and 5% in the following three years, the pace of pipeline connectivity, dependable CBG procurement and entity-level blending will become critical determinants of sectoral performance.

Sources:

PNGRB/ GAIL-CBG Connectivity and Performance data/ CBG Cell reports, FY 2025-26 & CBG-CGD Synchro Operator.

PNGRB – Status Report on CBG (CBG Infrastructure), March 2026.

PNGRB – Action Plan 2025–26, CBG Cell.

MoPNG – Policies / Guidelines on Natural Gas and CBG.

MoPNG – Extension of Synchronization Scheme, 18 March 2026.

MoPNG/GOBARDHAN – Biomass Aggregation Support.

CHAPTER VIII

Hydrogen Initiatives in PNGRB

1. Hydrogen in India's Emerging Energy Landscape

Hydrogen is emerging as an important component of India's long-term clean-energy transition, particularly for applications where direct electrification is difficult. The National Green Hydrogen Mission (NGHM), launched in January 2023, seeks to make India a global hub for production, use and export of Green Hydrogen and its derivatives. The Mission envisages at least 5 million tonnes per annum of Green Hydrogen production capacity by 2030, supported by associated renewable-energy capacity of about 125 GW. Its initial outlay is ₹19,744 crore.

For the downstream gas sector, hydrogen blending offers a potential transition pathway between conventional natural gas infrastructure and future dedicated hydrogen systems. The Mission also recognizes the importance of supply-chain infrastructure, including pipelines, storage and distribution networks, and calls for coordinated development of regulations and standards.

Table 8.1: National Green Hydrogen Mission – Key Targets and Financial Outlay

Indicator	National Green Hydrogen Mission
Launch	January 2023
Green Hydrogen production target by 2030	≥5 MMT/annum
Associated renewable-energy capacity	~125 GW
Initial Mission outlay	₹19,744 crore
SIGHT programme	₹17,490 crore
Pilot projects	₹1,466 crore
Research & Development	₹400 crore
Other Mission components	₹388 crore
Source: MNRE, National Green Hydrogen Mission; Government of India. https://mnre.gov.in/en/national-green-hydrogen-mission/	

2. PNGRB's Role in the Hydrogen Transition

Under Clause 6.4 of the National Green Hydrogen Mission, the Ministry of Petroleum and Natural Gas is to facilitate uptake of Green Hydrogen in refineries and city gas distribution and enable development and facilitation of regulations through PNGRB. This places the downstream gas regulator at an important interface between emerging hydrogen technologies and India's existing natural-gas infrastructure.

PNGRB's approach has consequently moved beyond conceptual assessment towards field pilots, technical readiness evaluation, regulatory preparedness, standards development and institutional coordination. The objective is to build an evidence base before hydrogen is introduced at scale into existing natural-gas networks.

Key Message: India's hydrogen transition requires not only production capacity but also safe, tested and standards-based transportation and distribution infrastructure.

3. Hydrogen Blending Pilots: Building India-Specific Evidence

PNGRB has initiated the first set of hydrogen-blending pilot projects in natural-gas/CGD networks. The pilots are designed to generate field evidence on the behaviour of hydrogen-natural-gas mixtures under Indian operating conditions and to support subsequent development of technical and regulatory requirements.

Table 8.2: Status of Hydrogen Blending Pilots

Pilot / Location	Network / Entity	Indicative blending	Key assessment focus
Indore, Madhya Pradesh	Steel / GAIL India Ltd.	2%	Pipeline behaviour and operational experience
Indore, Madhya Pradesh	MDPE / Avantika Gas Ltd.	5%	MDPE behaviour and consumer-end performance
Kawas, Gujarat	MDPE / Gujarat Gas Ltd.	5%	Network behaviour and metering
Jorhat, Assam	MDPE / Assam Gas Company Ltd.	2%	CGD network and consumer applications
Ahmedabad, Gujarat	MDPE / Adani Total Gas Ltd.	5%	Blending and downstream performance
Gorakhpur, Uttar Pradesh	Steel / Torrent Gas Ltd.	2%	Steel pipeline and operational assessment
Source: PNGRB records and hydrogen pilot-project information. PNGRB has publicly highlighted hydrogen blending pilots at 2–5% as part of its hydrogen regulatory preparedness.			

Across the pilots, attention is being given to material compatibility, leakage characteristics, stratification, metering, pipeline integrity and consumer-end performance. The pilots cover both steel and MDPE systems, thereby generating evidence relevant to both transmission-type and CGD environments.

4. Why Pilot Evidence Matters

Hydrogen differs materially from natural gas in physical and chemical characteristics. Its smaller molecular size, different energy content by volume, diffusion behaviour and interaction with materials can influence leakage, metering, appliance performance and pipeline integrity. Consequently, the permissible blending level cannot be determined solely by international experience; it needs validation against India's pipeline materials, operating pressures, asset condition and end-use equipment.

Table 8.3: Green Hydrogen Blending Pilots in CGD Networks

Evidence area	Regulatory relevance
Material compatibility	Assessment of steel, MDPE, welds and components
Leakage behaviour	Safety, integrity and operational controls
Metering	Accuracy under changed gas composition
Consumer equipment	Appliance and end-use compatibility
Pipeline integrity	Asset age, corrosion and pressure conditions
Operational performance	Basis for safe blending limits and protocols

PNGRB'S Approach:

Demonstrate in controlled pilots → assess evidence → validate through testing → develop standards → scale safely.

5. PNGRB's Hydrogen Regulatory Architecture

PNGRB has adopted a multi-dimensional approach to hydrogen transportation, combining institutional capacity, field demonstration, scientific assessment, standards development and stakeholder engagement.

Table 8.4: PNGRB Initiatives and Expected Outcomes for Hydrogen Development

PNGRB initiative	Purpose / expected outcome
Dedicated Hydrogen Cell	Institutional mechanism for regulatory development, technical assessment and coordination
Hydrogen blending pilots	Generate field evidence in steel and MDPE networks
Hydrogen Transportation Roadmap	Define phased pathway from blending to future dedicated transportation
Pipeline-readiness assessment	Identify segments suitable for initial hydrogen blending
National Hydrogen Testbed	Generate India-specific evidence on materials, components and operations
Scientific Advisory mechanism	Provide scientific and technical guidance on safety and standards
Standards and codes	Develop/adapt hydrogen-specific technical and operational requirements
National & international engagement	Leverage scientific, regulatory and industry experience
Regulatory/statutory preparedness	Provide clarity for future hydrogen transportation and blending
Source: PNGRB, Hydrogen Transportation Roadmap and PNGRB hydrogen initiatives; supplemented by PNGRB's 2026 public communication.	

6. Dedicated Hydrogen Cell

PNGRB has established a dedicated Hydrogen Cell to lead regulatory development, technical assessments, standards alignment and coordination with Ministries, public-sector entities, industry bodies and international organisations. The Cell provides an institutional mechanism for converting pilot findings and technical studies into a coherent regulatory framework.

7. Scientific and Institutional Engagement

PNGRB has undertaken technical engagements with national scientific and technical institutions and international organisations to strengthen its understanding of hydrogen transportation, pipeline safety and standards. These engagements include interactions with IITs, GERMI-Gujarat and specialised international institutions such as SGN and IGEM (UK), DNV and DVGW. PNGRB has also entered into international collaboration through an MoU with DVGW, strengthening cooperation and knowledge exchange in the areas of hydrogen, gas infrastructure, safety and technical standards. PNGRB has further participated in national-level standards and safety discussions relating to hydrogen.

These engagements are intended to ensure that India's emerging hydrogen framework benefits from global experience while remaining responsive to Indian pipeline materials, operating conditions, climatic conditions and downstream equipment.

8. Standards and Safety: From International Benchmarks to Indian Conditions

Hydrogen transportation requires standards covering material compatibility, embrittlement, leakage, odourisation, metering, pressure management, equipment performance and safety. PNGRB's roadmap envisages harmonisation with relevant international benchmarks, including consideration of standards such as ASME B31.12, while validating their applicability through Indian field and testbed evidence.

Regulatory Principle: International experience provides the benchmark; India-specific testing provides the evidence for safe application in Indian networks.

9. Hydrogen Transportation Roadmap: A Phased Pathway

PNGRB's Hydrogen Transportation Roadmap provides a phased pathway for introducing hydrogen into India's natural-gas and CGD pipeline systems while preparing for dedicated hydrogen transportation infrastructure over the longer term.

Table 8.5: Phased Roadmap for Hydrogen Transportation Development

Phase	Period	Principal focus
Phase I – Foundation & Validation	2025–2028	Capacity building; pipeline identification; pilot learnings; Hydrogen Cell; National Testbed; foundational standards; controlled blending
Phase II – Scale-up & Integration	2029–2033	Expansion of blending; integration with new corridors; updating standards using cumulative evidence
Long-term pathway	Beyond 2033	Progressive development of dedicated/pure hydrogen transportation corridors

Source: PNGRB, Hydrogen Transportation Roadmap, as reflected in the PNGRB hydrogen initiative note.

10. Pipeline Readiness Assessment

A major feature of the roadmap is the readiness-assessment approach for identifying natural-gas pipeline segments that may be considered for initial hydrogen blending. The assessment is intended to consider material compatibility, weld and component performance, corrosion condition, asset age, operating parameters and overall integrity.

Table 8.6: Key Parameters for Hydrogen Infrastructure Readiness Assessment

Readiness parameter	Why it matters for hydrogen
Pipeline material	Compatibility and embrittlement risk
Welds & components	Integrity under hydrogen service
Corrosion condition	Interaction with hydrogen and asset vulnerability
Asset age	Assessment of residual serviceability
Operating pressure	Safety and material-performance implications
Leakage characteristics	Hydrogen containment and safety
Meters/valves	Performance and measurement accuracy
End-use equipment	Consumer safety and appliance compatibility

11. From Blending to Dedicated Hydrogen Corridors

The strategic significance of the roadmap lies in its progression from limited, controlled blending towards progressively larger-scale integration and, ultimately, dedicated hydrogen transportation corridors. This allows infrastructure decisions to be based on evidence rather than assumptions and provides time for standards, equipment, safety systems and institutional capacity to mature.

Strategic Pathway:

Existing NG infrastructure → controlled blending → evidence generation → validated standards → higher integration → dedicated hydrogen corridors.

12. National Hydrogen Testbed: The Scientific Backbone

PNGRB has proposed a National Hydrogen Testbed with full-scale test loops representing both high-pressure transmission and low-pressure CGD/MDPE systems. The facility is intended to generate India-specific evidence on hydrogen embrittlement, fatigue, leakage, pressure cycling, meters and valves, compressor behaviour and elastomer compatibility, supported by real-time monitoring and instrumentation.

13. National Hydrogen Testbed: From Testing to Regulation

The proposed National Hydrogen Testbed is envisaged as a shared national scientific facility that can bridge the gap between laboratory knowledge, international experience and field deployment. Its central purpose is to establish a controlled environment in which materials, components and operating systems can be evaluated before wider deployment.

Table 8.7: Hydrogen Infrastructure – Testing Areas and Parameters

Testing domain	Indicative parameters / outputs
Materials	Compatibility, hydrogen embrittlement, degradation
Pipeline integrity	Fatigue, pressure cycling, mechanical performance
Leakage	Containment, joints, fittings and leakage behaviour
Meters & valves	Accuracy and functional performance
Compressors	Hydrogen-service operating behaviour
Elastomers	Compatibility and service performance
CGD / MDPE loop	Low-pressure distribution behaviour
Transmission loop	High-pressure pipeline behaviour
SCADA & instrumentation	Real-time monitoring and data capture
Standards validation	Evidence for Indian codes and operating protocols
Source: PNGRB Hydrogen Transportation Roadmap / PNGRB hydrogen initiative note.	

The Testbed is therefore not an infrastructure project in isolation; it is an enabling component of the regulatory system. Evidence generated through controlled testing can support standards, OEM certification, pilot approvals, risk assessment and future regulatory provisions.

14. Recent Developments During 2025–26

Table 8.8: Key Milestones in Hydrogen Development

Period	Selected development
2025	PNGRB's hydrogen regulatory preparedness strengthened through pilot, roadmap and institutional initiatives
2025	Hydrogen Transportation Roadmap and associated readiness framework progressed
2025	Hydrogen-focused technical and stakeholder engagements continued
27 Feb 2026	PNGRB highlighted hydrogen blending pilots (2–5%), Hydrogen Transportation Roadmap and proposed National Hydrogen Testbed at India–UK Conference on Green Hydrogen Standards and Safety Protocols
2026	Continued focus on safety standards, validated testing frameworks and evidence from field pilots

Source: PNGRB, India–UK Conference on Green Hydrogen Standards and Safety Protocols, 27 February 2026.

15. National Coordination and Standards Ecosystem

PNGRB's hydrogen work is aligned with the broader national framework involving MNRE, MoPNG, scientific institutions and industry. The National Green Hydrogen Mission provides the overarching policy framework, while PNGRB's role is particularly relevant to transportation and downstream integration through natural-gas and CGD infrastructure.

PNGRB's participation in national standards and safety discussions and its engagement with scientific and international institutions are intended to support a coordinated and science-based regulatory ecosystem. This coordination will become increasingly important as hydrogen moves from demonstration projects towards commercial-scale deployment.

Key Takeaway: The immediate regulatory priority is to generate credible India-specific evidence and translate it into enforceable technical, operational and safety requirements.

16. The Road Ahead: From Evidence to Scaled Deployment

Hydrogen is likely to become an increasingly important energy carrier in India's clean-energy transition. For the downstream gas sector, its significance extends beyond the fuel itself to the future use, adaptation and possible repurposing of existing infrastructure. The transition, however, must be evidence-based because hydrogen introduces new technical, operational and safety considerations.

PNGRB's emerging framework addresses this challenge through a sequence of demonstration, assessment, validation and regulation. The hydrogen blending pilots provide field evidence; the Hydrogen Cell provides institutional capacity; the readiness framework supports infrastructure screening; the proposed National Hydrogen Testbed provides controlled scientific validation; and the roadmap provides a phased pathway towards larger-scale integration.

17. PNGRB's Contribution to India's Hydrogen Readiness

Table 8.9: PNGRB Initiatives and Contributions towards Hydrogen Development

Dimension	PNGRB contribution
Demonstration	Hydrogen blending pilots in CGD / gas networks
Institutional readiness	Dedicated Hydrogen Cell
Infrastructure assessment	Pipeline-readiness framework
Scientific validation	Proposed National Hydrogen Testbed
Regulatory development	Standards, codes, protocols and compliance framework
Safety governance	Risk-based and evidence-led approach
Knowledge partnerships	Engagement with national and international technical institutions
Strategic planning	Hydrogen Transportation Roadmap
Long-term readiness	Preparation for larger blending and dedicated hydrogen corridors
Source: PNGRB hydrogen initiative notes and PNGRB public communications, 2025–26.	

18. Looking Ahead

India's hydrogen transition will require a coordinated ecosystem extending from production and storage to transportation, distribution and end use. For the natural-gas sector, the immediate opportunity is to establish the technical evidence needed to determine where and under what conditions hydrogen can safely be blended into existing networks.

The timely establishment and operationalization of the National Hydrogen Testbed, continued evaluation of pilot projects, development of India-specific standards and sustained coordination among regulatory, scientific and industry stakeholders will be critical to this process. These measures can provide the foundation for a progressive transition from controlled blending to wider hydrogen integration and, in the longer term, dedicated hydrogen transportation corridors.

FROM PILOTS TO POLICY • FROM EVIDENCE TO STANDARDS • FROM BLENDING TO FUTURE HYDROGEN CORRIDORS

CHAPTER IX

Tariff Reforms and Gas Transmission

Natural gas pipeline tariff regulation has undergone a significant structural transformation aimed at promoting an integrated national gas market, reducing geographical disparities in transportation charges and improving the competitiveness of natural gas for priority consumer segments.

The introduction of Unified Tariff (UFT) in 2023 marked a major shift from pipeline/path-specific transportation charges to a national grid-based tariff framework, operationalising the principle of “One Nation, One Grid, One Tariff.” The framework has since evolved from three tariff zones to two, while CNG and PNG-Domestic consumers have been accorded the lowest tariff-zone treatment irrespective of distance.

The tariff reforms may broadly be viewed under two dimensions:

- (A) Structural Change in Tariff Zones and
- (B) Tariff Liberalization for the Domestic Sector.

1. Structural Change in Tariff Zones

Introduction of Unified Tariff (UFT)

The Unified Tariff framework was operationalised from 1st April 2023 with three distance-based zones:

Table 9.1: UFT Structure and Tariff Zones

Tariff Zone	Distance	Initial UFT (₹/MMBTU)
Zone 1	Up to 300 Km	39.45
Zone 2	>300–1,200 Km	74.97
Zone 3	>1,200 Km	99.90
Levelized UFT	-	73.93

The initial structure therefore provided a substantial differential across distance bands: the Zone-3 tariff was about 2.53 times the Zone-1 tariff.

Under UFT, the shipper pays the applicable unified zonal tariff irrespective of the number of pipelines forming the contractual transportation path. Pipeline entities receive their approved revenue entitlement, with differences between collections and entitlement addressed through the settlement mechanism.

2. Evolution of Unified Tariff Rates

Table 9.2: Unified Fixed Tariff (UFT) Rates by Tariff Period

Tariff period	Zone 1*	Zone 2*	Zone 3*	Levelized*
Apr. 2023	39.45	74.97	99.90	73.93
Subsequent revision	40.00	79.00	114.52	81.13
Jan.–Mar. 2026	54.00	102.86	Discontinued	83.94
*₹/MMBTU				

The data show that nominal UFT rates increased over the period, while the tariff structure simultaneously became simpler. Between April 2023 and January 2026, Zone-1 and Zone-2 rates increased by approximately 36.9% and 37.2%, respectively.

3. Three Zones to Two Zones

An important structural reform was notified on 7th July 2025, reducing the number of UFT zones from three to two. Zone 1 continues to cover distances up to 300 km, while the entire distance beyond 300 km is now covered by Zone 2; the earlier Zone 3 has been discontinued.

Table 9.3: Comparison of Earlier and Revised UFT Zone Structure

Feature	Earlier UFT	Revised UFT
Number of zones	3	2
Zone 1	≤300 Km	≤300 Km
Zone 2	300–1,200 Km	>300 Km
Zone 3	>1,200 Km	Discontinued

For January–March 2026, the applicable UFT was ₹54.00/MMBTU for Zone 1 and ₹102.86/MMBTU for Zone 2, with a levelized tariff of ₹83.94/MMBTU. Thus, the Zone-2 rate was about 90.5% higher than Zone 1, but the separate tariff band beyond 1,200 Km no longer exists.

4. Tariff liberalization for domestic sector

Preferential Treatment for CNG and PNG-Domestic

One of the major objectives of this reform notified in 2025 was to classify CNG and PNG-Domestic consumers under Zone 1 for UFT purposes, irrespective of their actual distance from the gas source. This provides these priority consumer segments access to the lowest applicable tariff and supports wider adoption of natural gas in transport and domestic sectors.

With effect from January 2026 till March 2026:

Table 9.4: Applicable UFT by Consumer Category and Distance

Consumer/Location	Applicable UFT (₹/MMBTU)
All consumer ≤300 Km (Zone 1)	54.00
All consumers other than CNG and PNG D >300 Km (Zone 2)	102.86
CNG – irrespective of distance	54.00
PNG-Domestic – irrespective of distance	54.00

Thus, for CNG and PNG-Domestic consumers located beyond 300 Km, the effective transportation tariff is ₹48.86/MMBTU lower than the normal Zone-2 tariff.

This represents a shift in tariff incidence from a predominantly distance-based approach to a consumer-category-based approach for these priority segments.

Estimated Impact on CGD Consumers

PNGRB has estimated that the reform could reduce CGD-sector transportation costs by approximately ₹1,000 crore annually. The estimated reduction in delivered prices is:

Table 9.5: Segment-wise estimated reduction

Consumer segment	Estimated reduction
CNG	₹1.25–2.50/kg
PNG-Domestic	₹0.90–1.80/SCM
CGD transportation cost	~₹1,000 crore/year

5. Statistical Assessment

The principal measurable outcomes of the tariff reforms are summarised below:

Table 9.6: UFT Revision – Structural Changes and Consumer Impact

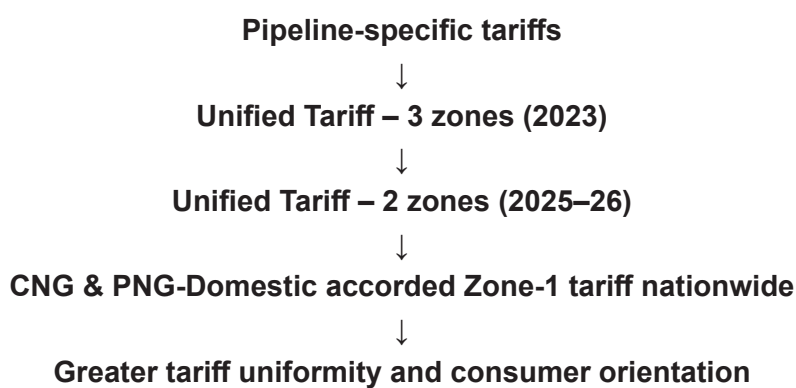
Indicator	2023	2026	Change/Outcome
UFT zones	3	2	–33.3%
Separate highest-distance zone	>1,200 Km	Removed	Structural simplification
CNG/PNG-D beyond 300 Km	Higher zone	Zone-1	Consumer relief
CNG/PNG-D tariff advantage	—	₹48.86/MMBTU	47.5%

The statistical evidence indicates that the reform has operated along two complementary dimensions:

- (i) Simplification and integration of the national transportation tariff structure; and
- (ii) Targeted reduction in the transportation-cost burden on mass-consumption segments of the CGD sector.

6. Overall Assessment

The tariff reform trajectory may be summarised as:



The reforms therefore represent a progressive movement towards an integrated national gas market, while retaining differentiated tariffs where required to balance tariff uniformity with cost recovery.

CHAPTER X

Consumer Grievances and Resolutions – 2025-26

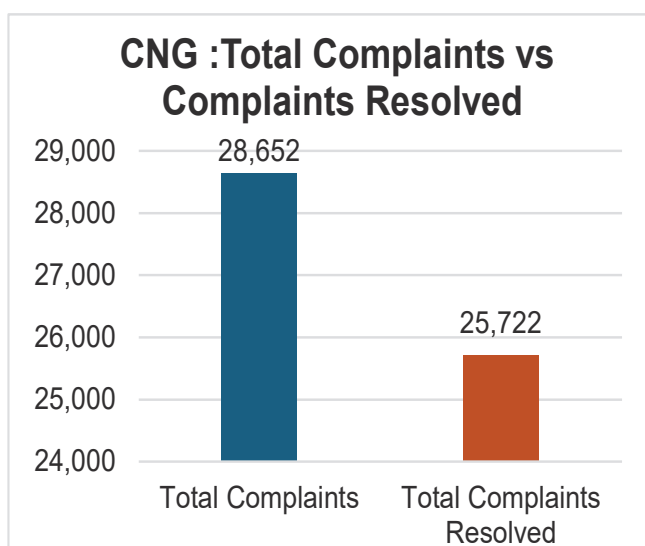
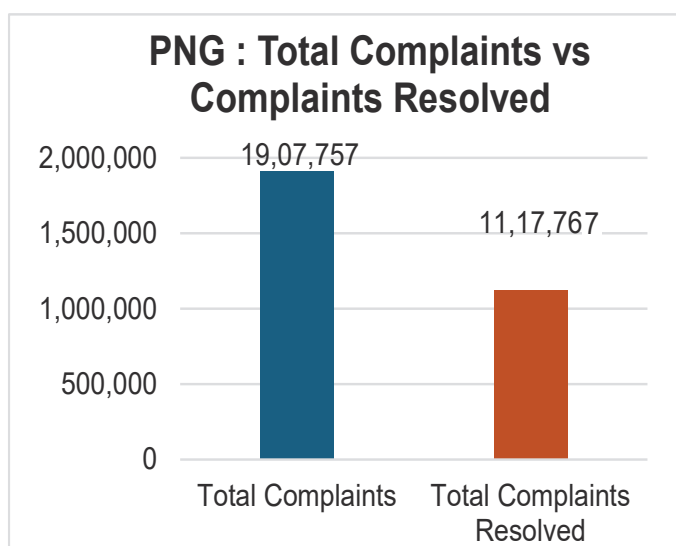
Grievance redressal forms a vital pillar of operational efficiency and consumer protection within the City Gas Distribution (CGD) sector. Effective tracking of grievances and their resolutions not only measures service delivery across Geographical Areas (GAs) but also provides systemic visibility into operational bottlenecks ranging from gas availability to facility maintenance, billing procedures, etc.

This chapter evaluates the effectiveness of resolution provided for the grievances/complaints during FY 2025–26 by the CGD Entities. The data provides a detailed statistical overview across 307 GA records, evaluating yearly, monthly and entity-level resolution metrics.

1. Executive Summary

Table 10.1: Overall Summary

Segment	No of Complaints (A)	Complaints Resolved (B)	Resolution (%) (B/A)	Share of segment of Total Complaints
PNG (I)	19,07,757	11,17,767	58.6%	98.5%
CNG (II)	28,652	25,722	89.8%	1.5%
Total III=(I+II)	19,36,409	11,43,489	59.05%	100.0%



CNG complaints resolution rate is 89.8 % against a resolution rate of 58.6 % for PNG complaints i.e. 31.2 percentage points more.

2. Month Wise Analysis

Table 10.2: Monthly complaint and resolution statistics (PNG – CNG)

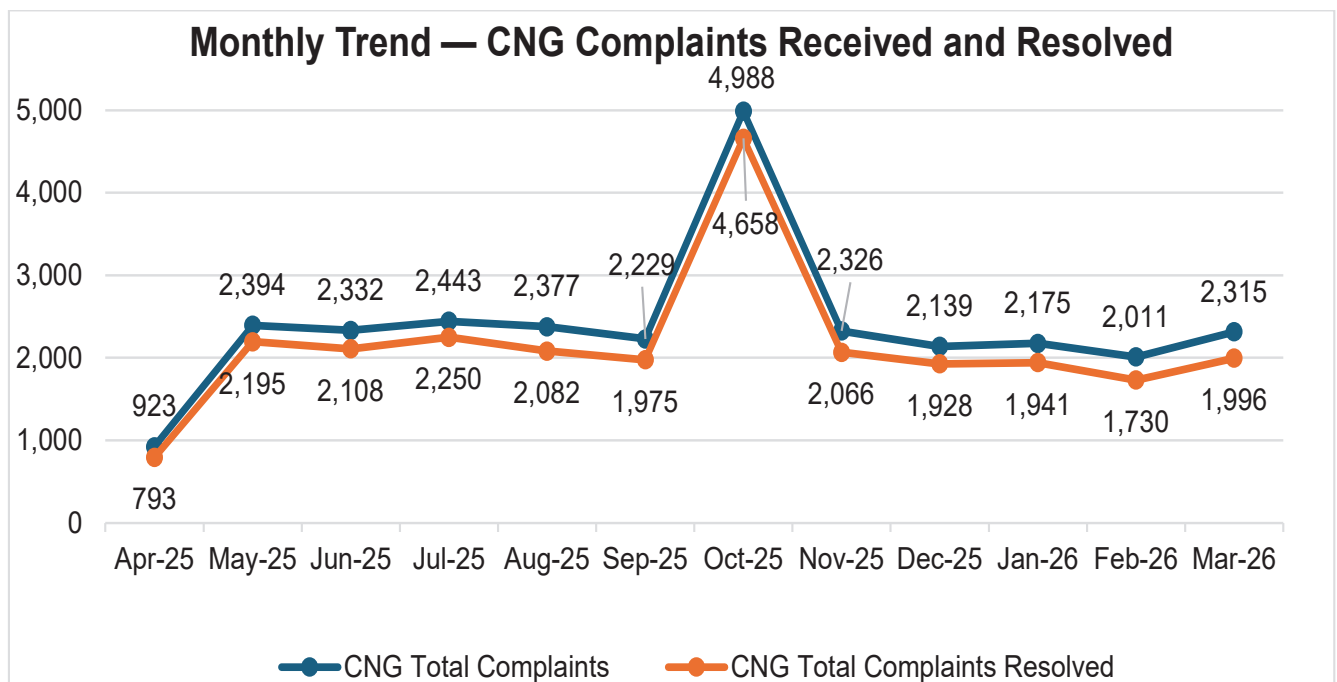
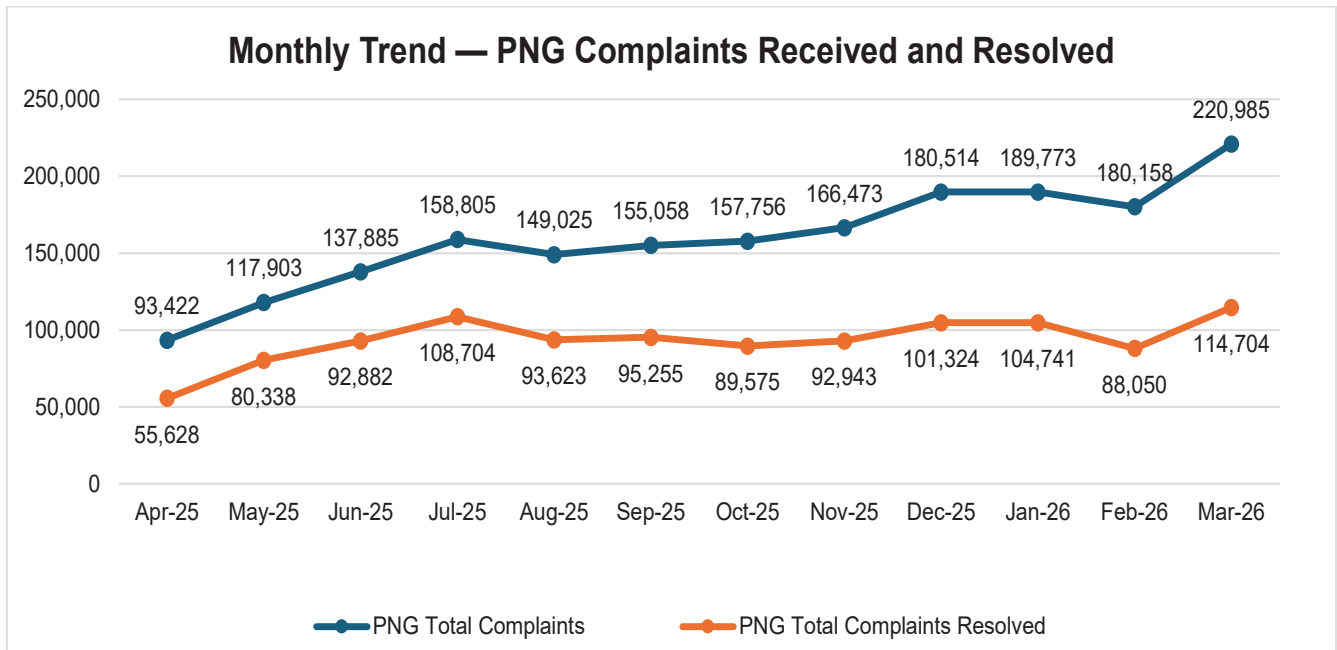
Month	PNG Complaints Received (including carry forward)	PNG Complaints Resolved	PNG Complaints Resolution (%)	CNG Complaints Received (including carry forward)	CNG Complaints Resolved	CNG Complaints Resolution (%)
Apr 25	93,422	55,628	59.5%	923	793	85.9%
May 25	1,17,903	80,338	68.1%	2,394	2,195	91.7%
Jun 25	1,37,885	92,882	67.4%	2,332	2,108	90.4%
Jul 25	1,58,805	1,08,704	68.5%	2,443	2,250	92.1%
Aug 25	1,49,025	93,623	62.8%	2,377	2,082	87.6%
Sep 25	1,55,058	95,255	61.4%	2,229	1,975	88.6%
Oct 25	1,57,756	89,575	56.8%	4,988	4,658	93.4%
Nov 25	1,66,473	92,943	55.8%	2,326	2,066	88.8%
Dec 25	1,80,514	1,01,324	56.1%	2,139	1,928	90.1%
Jan 26	1,89,773	1,04,741	55.2%	2,175	1,941	89.2%
Feb 26	1,80,158	88,050	48.9%	2,011	1,730	86.0%
Mar 26	2,20,985	1,14,704	51.9%	2,315	1,996	86.2%

Table 10.3: Month on Month % change in Total Complaints

Month	PNG MoM %	CNG MoM %
Apr 25	-	-
May 25	+26.2%	+159.4%
Jun 25	+16.9%	-2.6%
Jul 25	+15.2%	+4.8%
Aug 25	-6.2%	-2.7%
Sep 25	+4.0%	-6.2%
Oct 25	+1.7%	+123.8%
Nov 25	+5.5%	-53.4%
Dec 25	+8.4%	-8.0%
Jan 26	+5.1%	+1.7%
Feb 26	-5.1%	-7.5%
Mar 26	+22.7%	+15.1%

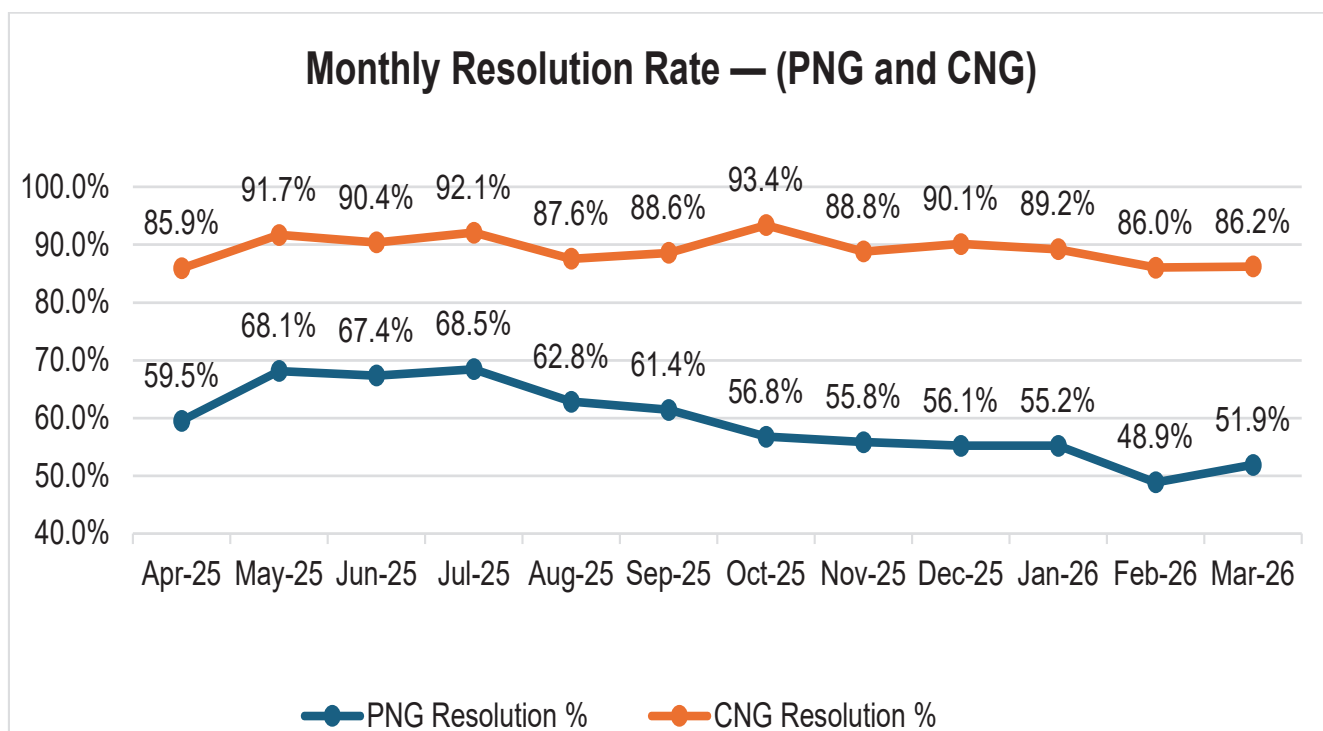
3. Monthly Trend Analysis

Monthly Total Complaints and Total Complaints Resolved



PNG complaints increased from 93,422 in April 2025 to 2,20,985 in March 2026, an increase of 136.5%. March recorded the highest no of PNG complaints. Similarly, CNG complaints increased from 923 to 2,315 an increase of 150.8 %.

Monthly Resolution Percentage



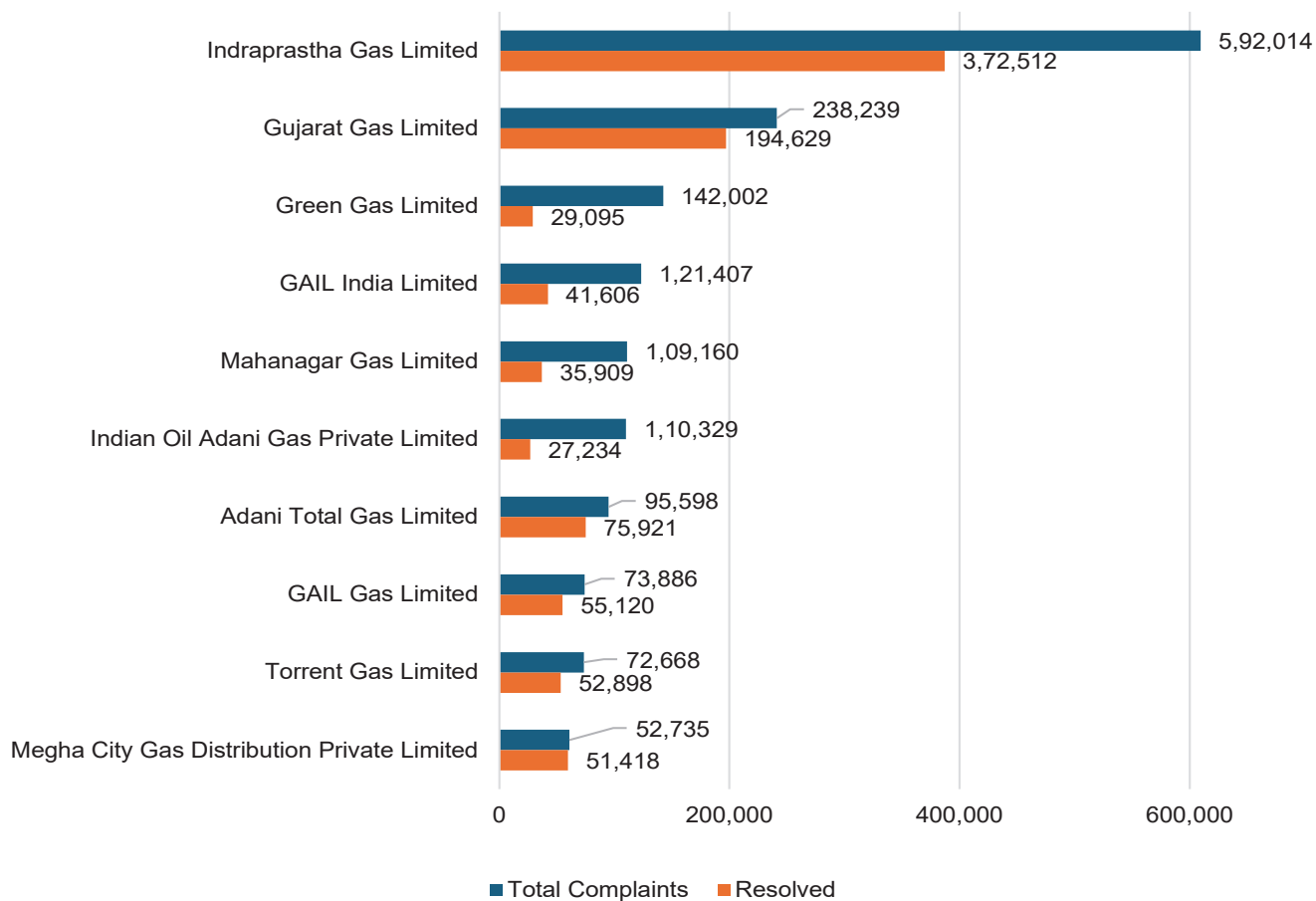
PNG Complaints resolution percentage was highest in July 2025 at 68.5% and lowest in February 2026 at 48.9%. For CNG, October 2025 recorded the highest resolution percentage at 93.4%, while April 2025 recorded the lowest resolution percentage at 85.9%. The CNG resolution percentages above the PNG resolution percentages for each month.

4. Entity Analysis (Top Ten Entities):

Table 10.4: Total Complaints in PNG

Rank	Entity	Total Complaints	Resolved	Resolution (%)
1	Indraprastha Gas Limited	5,92,014	3,72,512	62.9%
2	Gujarat Gas Limited	2,38,239	1,94,629	81.7%
3	Green Gas Limited	1,42,002	29,095	20.5%
4	GAIL India Limited	1,21,407	41,606	34.3%
5	Mahanagar Gas Limited	1,09,160	35,909	32.9%
6	Indian Oil Adani Gas Private Limited	1,10,329	27,234	24.7%
7	Adani Total Gas Limited	95,598	75,921	79.4%
8	GAIL Gas Limited	73,886	55,120	74.6%
9	Torrent Gas Limited	72,663	52,898	72.8%
10	Megha City Gas Distribution Private Limited	52,735	51,418	97.5%

Entity-wise Complaints Received and Resolved PNG

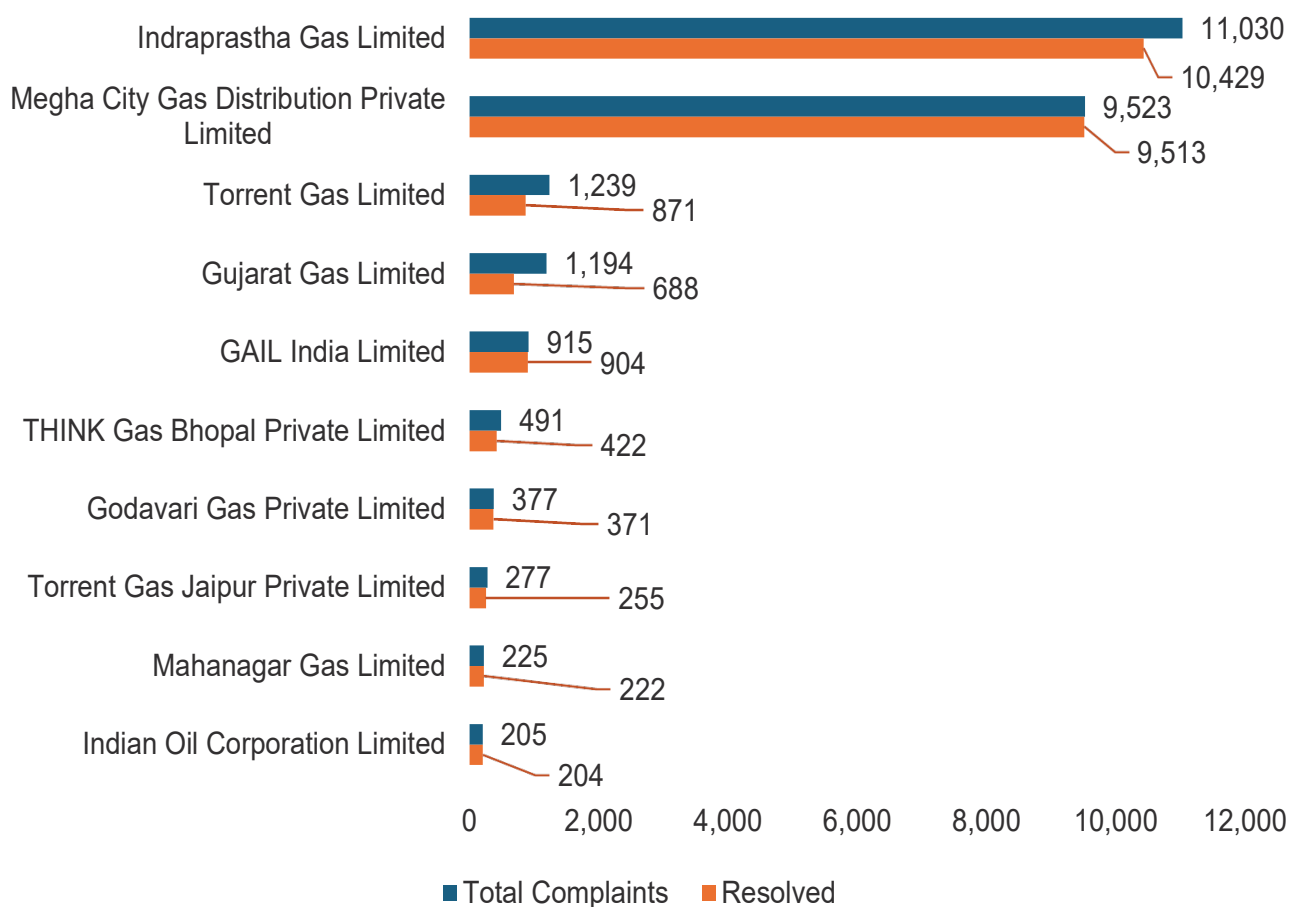


Resolution % ranges from 20.5% (GGL) to 97.5% (MCGDPL) PNG

Table 10.5: Total Complaints in CNG

Rank	Entity	Total Complaints	Resolved	Resolution (%)
1	Indraprastha Gas Limited	11,030	10,429	94.6%
2	Megha City Gas Distribution Private Limited	9,523	9,513	99.9%
3	Torrent Gas Limited	1,239	871	70.3%
4	Gujarat Gas Limited	1,194	688	57.6%
5	GAIL India Limited	915	904	98.8%
6	THINK Gas Bhopal Private Limited	491	422	85.9%
7	Godavari Gas Private Limited	377	371	98.4%
8	Torrent Gas Jaipur Private Limited	277	255	92.1%
9	Mahanagar Gas Limited	225	222	98.7%
10	Indian Oil Corporation Limited	205	204	99.5%

Entity-wise Complaints Received and Resolved CNG



Resolution % ranges from 57.6% (GGL) to 99.9% (MCGDPL) CNG

5. Entity Performance Classification

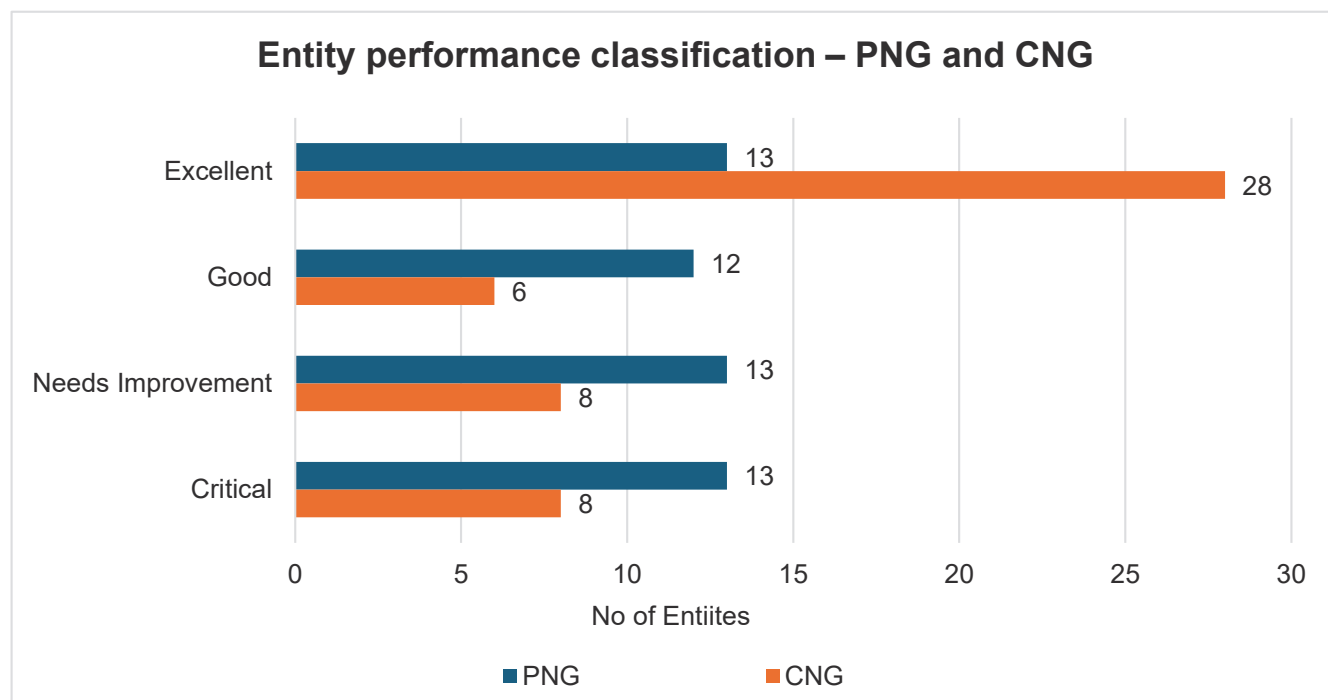
Entities have been classified based on Resolution % as follows:

- Excellent at 90% and above.
- Good from 75% to 90%.
- Needs Improvement from 50% to 75%.
- Critical below 50%.

Table 10.6: Entity performance classification – PNG and CNG

Segment	No of Entities	Total Complaints	Resolved	Group Resolution (%)
PNG				
Excellent	13	1,00,245	97,921	97.7%
Good	12	3,75,733	307,205	81.8%
Needs Improvement	13	8,02,355	5,23,481	65.2%
Critical	13	6,29,424	1,89,160	30.1%

Segment	No of Entities	Total Complaints	Resolved	Group Resolution (%)
CNG				
Excellent	28	23,587	22,910	97.1%
Good	6	907	760	83.8%
Needs Improvement	8	2,678	1,699	63.4%
Critical	8	1481	355	24.0%



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Abbreviation	Full Form
AGCL	Assam Gas Company Limited
APS	Average Performance Score
APSEZ	Adani Ports and Special Economic Zone Limited

Abbreviation	Full Form
ASME	American Society of Mechanical Engineers
ATF	Aviation Turbine Fuel
AVG.	Average
BCM	Billion Cubic Metres
BPCL	Bharat Petroleum Corporation Limited
CBG	Compressed Biogas
CBO	CBG Blending Obligation
CCPS	Combined CGD Performance Score
CGD	City Gas Distribution
CNG	Compressed Natural Gas
CNG (T)	Compressed Natural Gas (Transport)
CSS	Consumer Satisfaction Survey
DPI	Development of Pipeline Infrastructure (Scheme for CBG Offtake)
DPNG	Domestic Piped Natural Gas
ERDMP	Emergency Response and Disaster Management Plan
FY	Financial Year
GAIL	GAIL (India) Limited
GAs	Geographical Areas
GERMI	Gujarat Energy Research and Management Institute
GGL	Gujarat Gas Limited
GIGL	GSPL India Gasnet Limited
GIS	Geographic Information System
GITL	GSPL India Transco Limited
GOBARdhan	Galvanizing Organic Bio-Agro Resources Dhan
Gr.	Grade
GSPL	Gujarat State Petronet Limited
GW	Gigawatt
H ₂	Hydrogen
HPCL	Hindustan Petroleum Corporation Limited
IGGL	Indradhanush Gas Grid Limited
IHBL	IHB Limited
IIT	Indian Institutes of Technology
IMS	Integrity Management System
IOCL	Indian Oil Corporation Limited
Km	Kilometre
KSPPL	Kochi Salem Pipeline Private Limited
LNG	Liquefied Natural Gas
LPG	Liquefied Petroleum Gas
MDPE	Medium Density Polyethylene
MIS	Management Information System
MMBTU	Million Metric British Thermal Unit

Abbreviation	Full Form
MMSCM	Million Metric Standard Cubic Metre
MMSCMD	Million Metric Standard Cubic Metre per Day
MMT	Million Metric Tonnes
MMTPA	Million Metric Tonnes Per Annum
MNRE	Ministry of New and Renewable Energy
MoM	Month-on-Month
MoPNG	Ministry of Petroleum and Natural Gas
MoU	Memorandum of Understanding
MWP	Minimum Work Programme
NA	Not Applicable
NG	Natural Gas
NGHM	National Green Hydrogen Mission
NGPL	Natural Gas Pipelines
OEM	Original Equipment Manufacturer
OIL	Oil India Limited
ONGC	Oil and Natural Gas Corporation Limited
P.A.	Per Annum
P/L	Pipeline
PIL	Pipeline Infrastructure Limited
PMHBL	Petronet MHB Limited
PNG	Piped Natural Gas
PNG-C	Piped Natural Gas – Commercial
PNG-D	Piped Natural Gas – Domestic
PNG-I	Piped Natural Gas – Industrial
PPAC	Petroleum Planning & Analysis Cell
PPPL	Petroleum & Petroleum Product Pipelines
PSU	Public Sector Undertaking
RGPL	Reliance Gas Pipelines Limited
RLNG	Regasified Liquefied Natural Gas
SATAT	Sustainable Alternative Towards Affordable Transportation
SCADA	Supervisory Control and Data Acquisition
SCM	Standard Cubic Metre
SCMD	Standard Cubic Metre per Day
SIGHT	Strategic Interventions for Green Hydrogen Transition
T4S	Technical Standards and Specifications including Safety Standards
UFT	Unified Tariff



पेट्रोलियम एवं प्राकृतिक गैस विनियामक बोर्ड

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