

India Petrol Station - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The India Petrol Station Market is expected to register a CAGR of greater than 5% during the forecast period.

COVID-19 negatively impacted the market in 2020. Presently the market has now reached pre-pandemic levels.

Key Highlights

- Over the long term, factors such as increasing demand for petroleum products and the rising sale of passenger vehicles in India are expected to help the market grow during the forecast period.
- On the other note, the increasing cost of petrol & diesel fuels is anticipated to restrain the growth of the fuel station fuel market in the coming years.
- Nevertheless, converting the fuel stations in India to provide multiple fueling options such as petrol, diesel, and flex fuels, besides electric vehicle (EV) charging facilities, compressed natural gas is expected to offer vast opportunities in the future.

India Petrol Station Market Trends

The Private Owned Segment is Expected to be the Fastest-Growing Market

- The private-owned segment is expected to witness significant growth during the forecast period due to rising fuel demand and the liberalization of fuel retailing in India.
- Looking at the future potential, various global players are interested in entering the Indian fuel retail segment. As of 1st May

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2022, Reliance Industries Limited has 1,459 fuel stations, Nayara Energy (formerly Essar Oil) has 6,604, Royal Dutch Shell has 324 outlets, and other companies have 34 outlets. This, in turn, replicates the growth in the Indian fuel station market.

- In June 2022, The government of India announced the implementation of Universal Service Obligation (USO) for all retail outlets. As per the rule, petrol pumps cannot stop selling petrol and diesel. This rule is also applicable to petrol pumps in remote areas. The government has made it clear that whoever does not follow these rules will get their license canceled.
- Moreover, according to the Ministry of Petroleum and Natural Gas, during the FY2021-2022 (as of 9th April 2022), Indian gasoline consumption rose to 30.85 million metric tonnes (MMT), showing a growth of 13% compared to the previous year, and the diesel has reached 76.69 MMT with a 5% rise from FY2020-21. The Government of India is relaxing restrictions on the sale of gasoline and aviation fuel and encouraging private players like British Petroleum, TotalEnergies, and Trafigura in India. This is likely to make the companies in the private-owned segment dominate the market during the forecast period.
- Hence, with the increase in demand for fuel and the growing interest of the private players in the Indian fuel station sector, the private-owned segment is expected to grow significantly during the forecast period.

Rising Passenger Vehicles Penetration May Help the Market Grow

- India is one of the largest economies in the world. Further, the country is expected to remain the fastest-growing economy during the forecast period due to the rising population, urbanization, and industrialization.
- The country has seen remarkable economic growth in recent years, with rising living standards and average income. A steady rise in vehicle sales has also been witnessed in recent years.
- India has seen a total annual vehicle sales rise from 1.98 million in 2008 to 3.78 million in 2021, of which the passenger vehicles alone accounted for 3.06 million. Further, vehicle sales are expected to grow during the forecast period, which may increase the demand for fuel and fuel stations in the country.
- The rise of the Indian middle class is essential in vehicle sales. Moreover, an estimated 500 million people will likely move into the middle-and high-income brackets by 2030. This is expected to go together with the rise in vehicle sales.
- Hence, all these factors are expected to cause a rise in vehicle sales in India, likely to propel the demand for retail fuel stations during the forecast period.

India Petrol Station Industry Overview

The Indian fuel station market is moderately consolidated. Some of the key players (in no particular order) include Indian Oil Corporation Ltd, Bharat Petroleum Corp. Ltd, Hindustan Petroleum Corporation Limited, Nayara Energy Limited, and Reliance Industries Limited.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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