

Unlock full potential of CGD industry in India

PNGRB CGD Conference

17th February 2026



India's CGD sector is scaling...

307

GAs authorized covering
~100% population

1.6Cr

Total DPNG connections

1 Cr

Total billed DPNG
connections

8,500

CNG stations set-up

48 MMSCMD

CGD gas sales

68k

Total C&I PNG connections

308k inch-km

Steel pipeline laid by CGD
entities

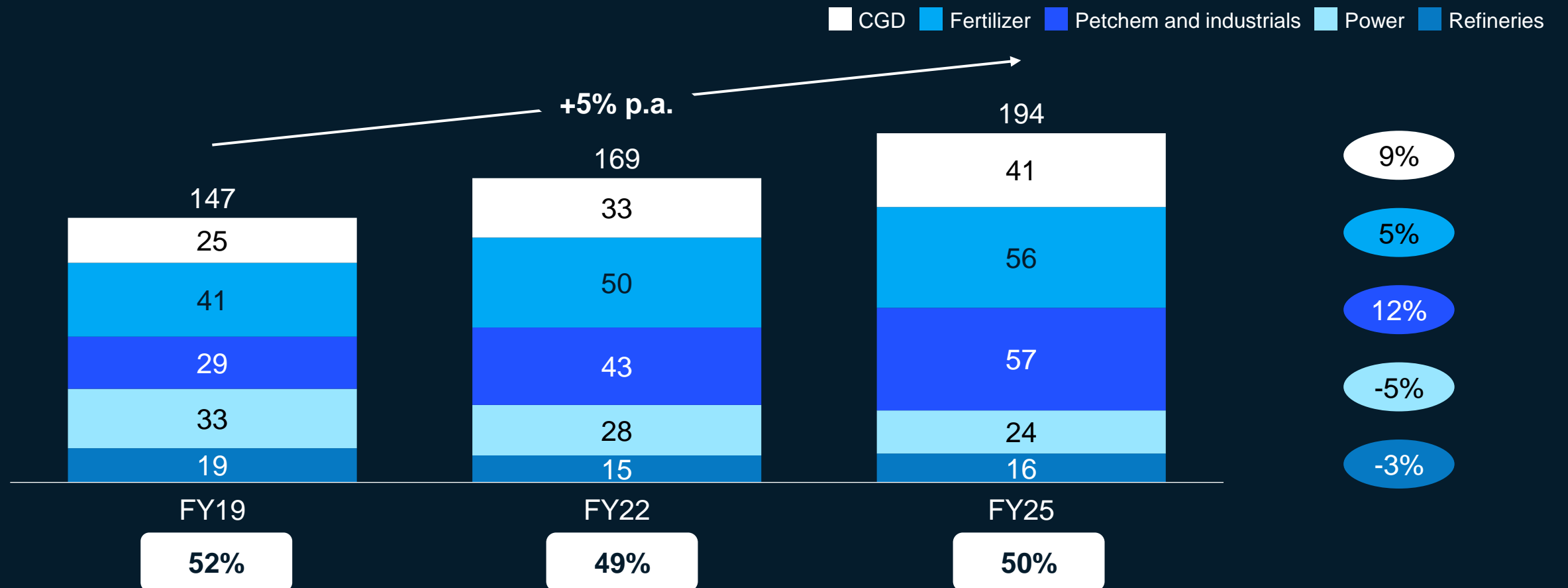


CGD has been an important driver of Natural Gas consumption in India

XX RLNG share (%)

India Natural Gas Consumption, FY19– FY25, mmscmd

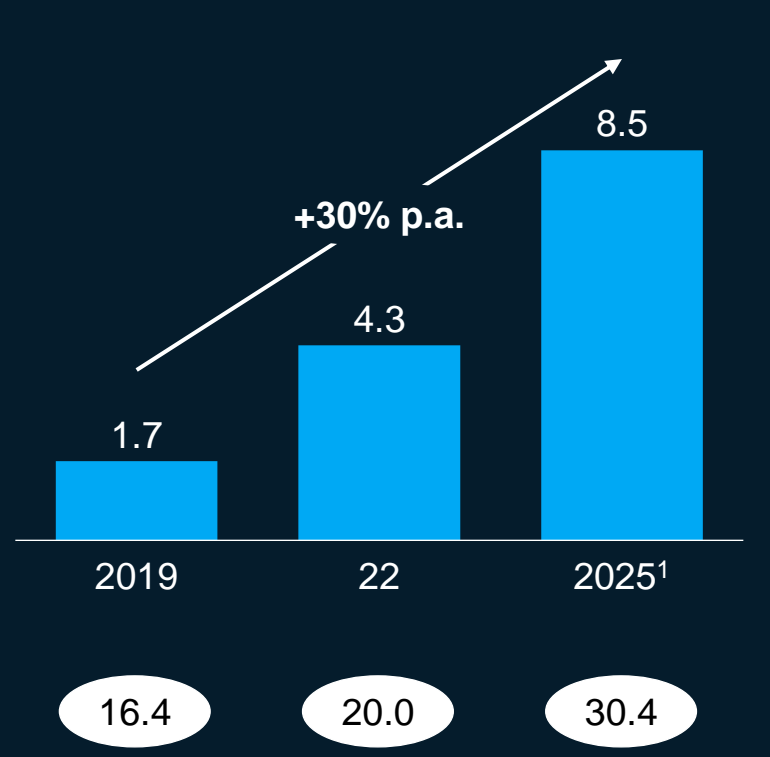
CAGR, % FY19 –FY25



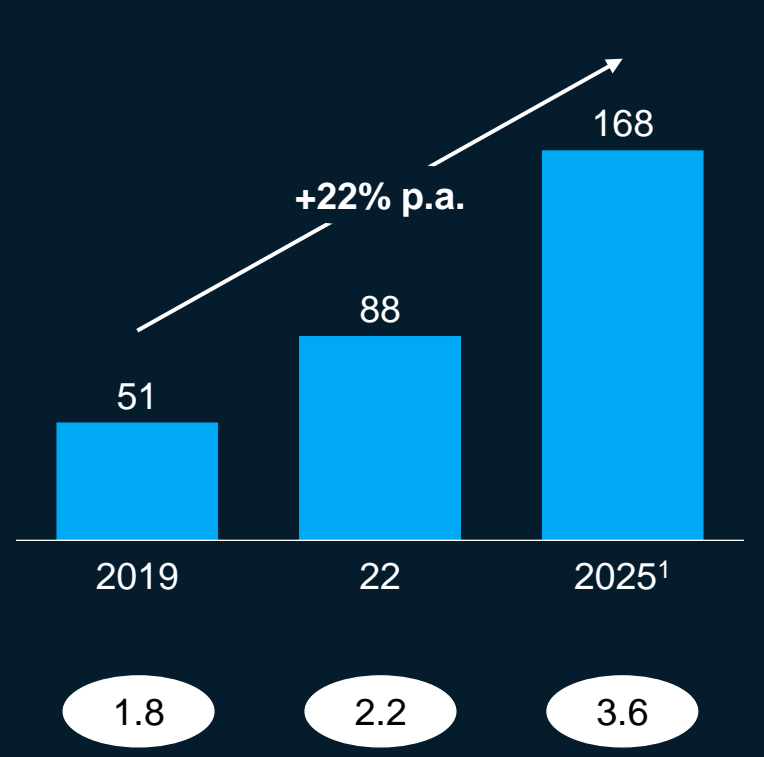
CGD segment growth driven by strong infrastructure build-out

XX Gas Sales, mmscmd

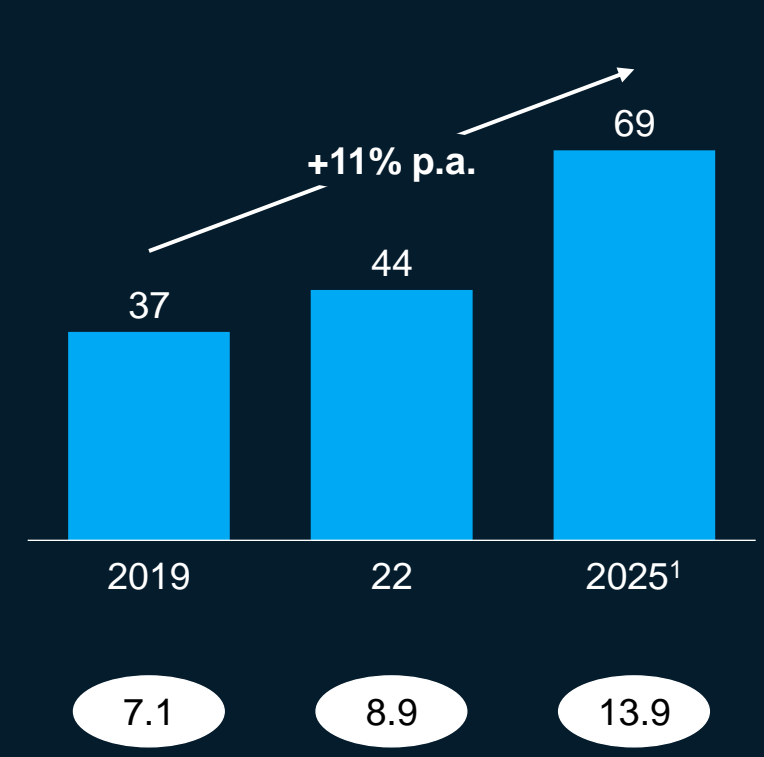
CNG stations
2019 – 2025¹, '000



DPNG connections
2019 – 2025¹, 'lakh



C&I PNG connections
2019 – 2025¹, '000



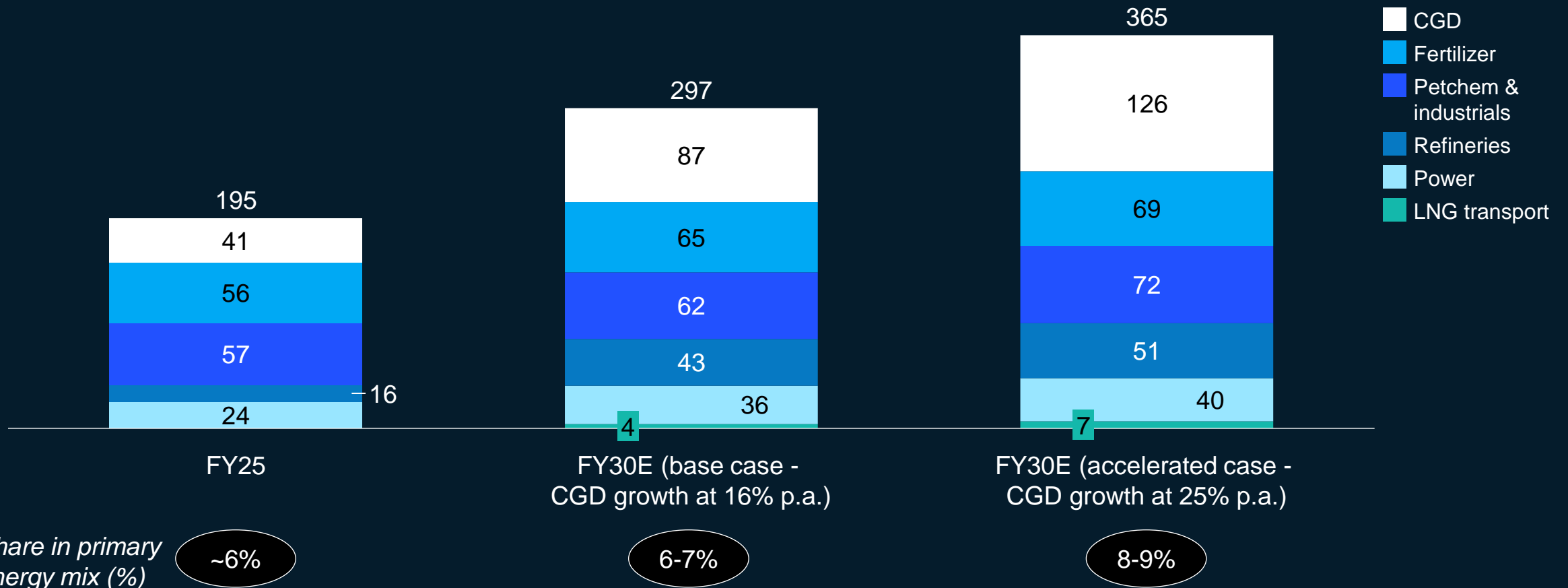
1. 2025 data reported as of Nov'25; Split by segment estimated for 2019,22

Source: PNGRB CGD MIS (2019–2025), Press Search, PNGRB CGD MIS Nov'25

CGD expected to be the primary driver of growth for Natural Gas consumption

XX Share in primary energy mix (%)

India Natural Gas Consumption, FY25 – FY30E, mmscmd

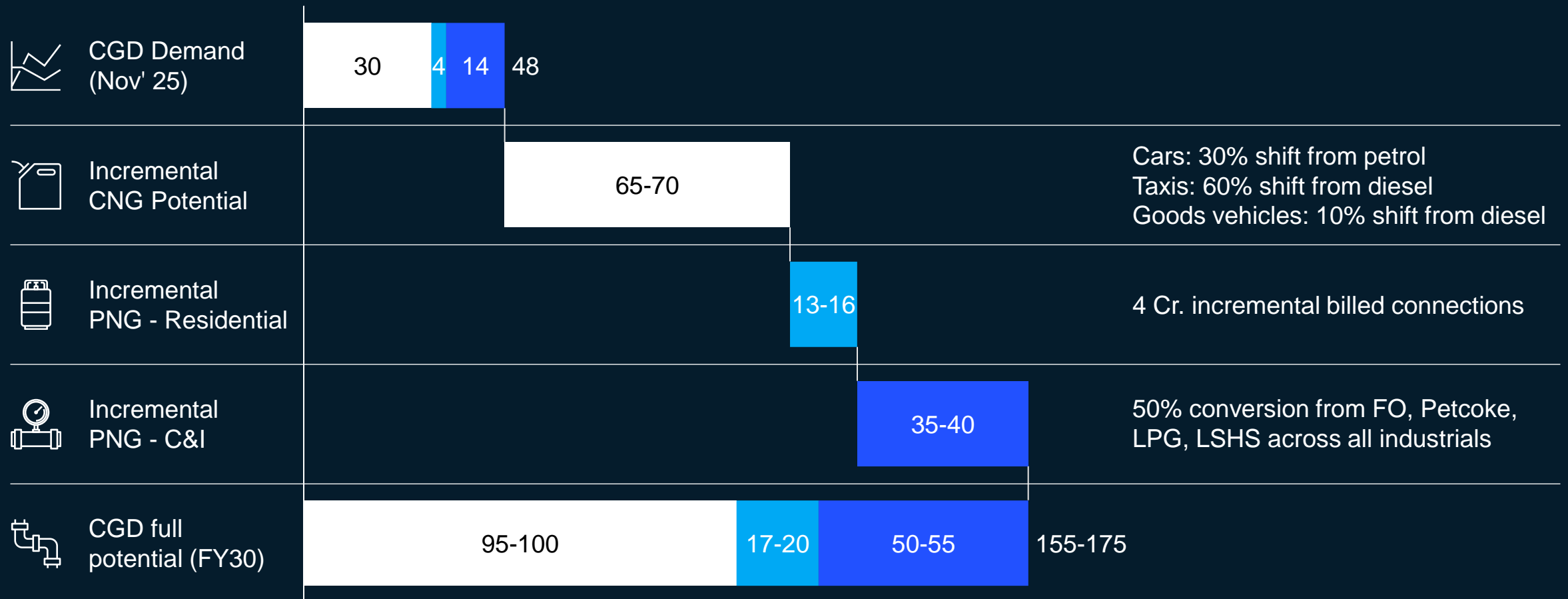


1. Include Steel, Tea plantation, Industries, LPG Shrinkage

In a significantly accelerated scenario, CGD sector has potential to consume 155-175 mmscmd Natural Gas

■ CNG ■ DPNG ■ C&I PNG

CGD demand full potential, FY30, mmscmd



Unlocking next phase of CGD growth requires coordinated action across 5 elements

A New-use cases for gas consumption

Scale high-potential use cases beyond PNG & CNG (e.g., trigeneration, LNG for transport sector)

B Innovations for adoption and efficiency improvement

Improve adoption across segments and operational efficiencies leveraging global and domestic innovations

C Gas supply availability and security

Eliminate last-mile connectivity and gas availability constraints

D Cutting-edge automation and digitization

Transform operations across functions through automation and advanced monitoring

E Policy and administrative support

Enable accelerated CGD sector growth with supportive regulatory and administrative policies



A. Unlock high potential demand segments for gas consumption

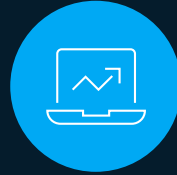
Overall gas sector

- 1 LNG for transport** – Develop market for using LNG in heavy duty trucks and mining dumpers
- 2 Industrials** – Structural shift from high-emission fuels – petcoke, FO, LPG, coal
- 3 Power** – Increase utilization of 20 GW gas-power plants

CGD sector

- 4 Trigeneration** – Supply gas-based power-heating-cooling to large complexes
- 5 Gas-based appliance** – Use gas-based appliances in homes - ACs, heaters

A. Potential areas for panel discussion



Which relatively newer use-cases could have most substantial impact on gas consumption over the next decade?



What is the role the industry and regulator need to play to enable significant scale-up of these new use-cases?



How can India leverage expected supply-long LNG market to increase viability for these new use-cases?

B. Leverage innovations to materially improve adoption

1 High-throughput CNG dispensers



2 Four-arm CNG dispensers



3 Combined compressor dispenser units



4 Small-scale LNG for industrial supply



5 Mobile CNG/ LNG refueling system



6 Pre-paid smart meters



B. Potential areas for panel discussion



Which global and domestic innovations can have substantial impact on adoption in CGD segment?



What are learnings from some established projects and pilots across these innovations?

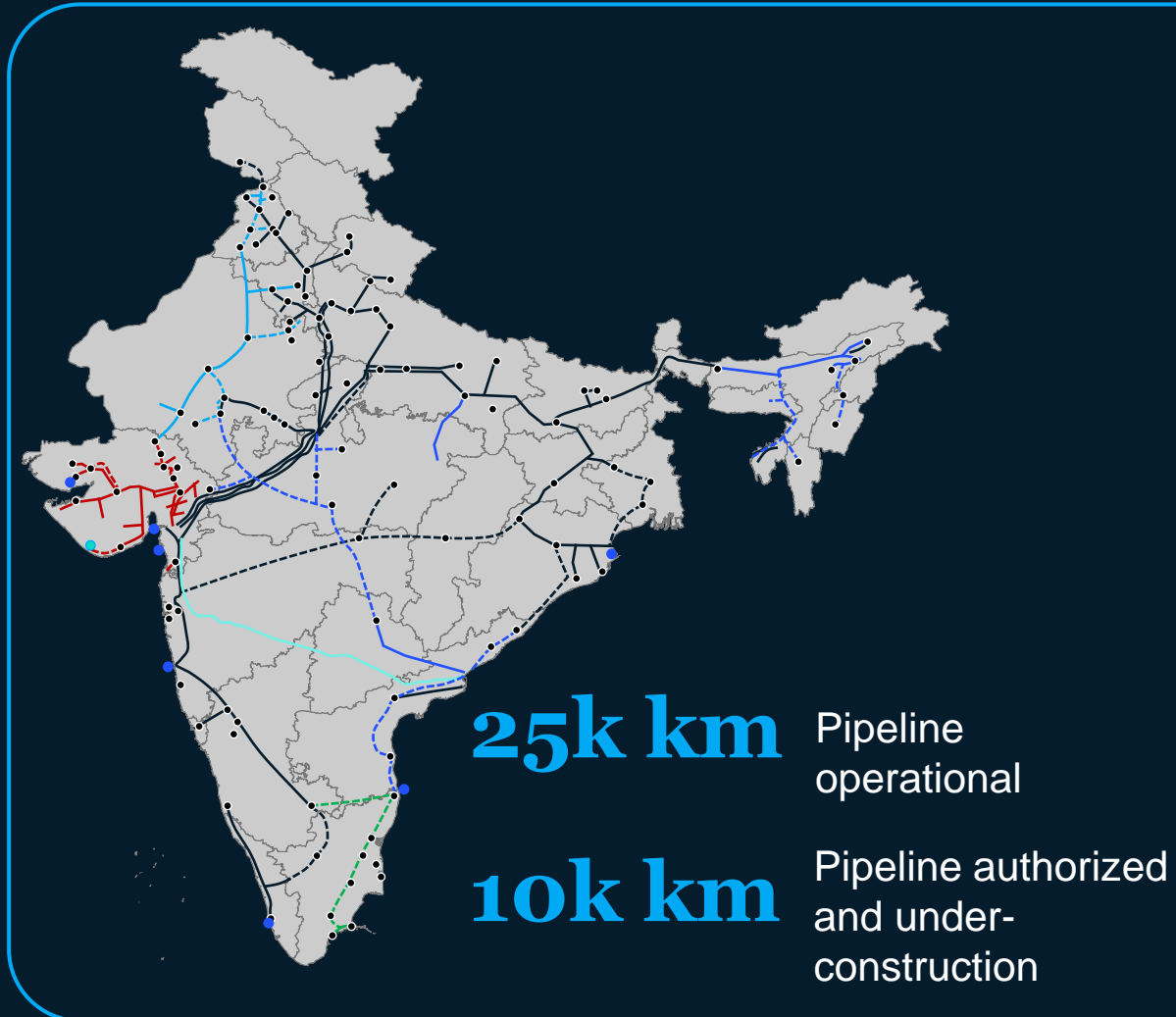


What are the bottlenecks in widespread adoption and scale-up of these innovations?



How can India develop an ecosystem for their structural adoption?

C. Ensuring Gas Supply Availability & Energy Security



50+ LCNG stations

Operated by 10+ CGD entities across India



Structural connectivity gaps still exist

- 80+ GAs not connected with trunk pipeline
- Several authorized GAs are located 100–200 km away from nearest trunk pipeline

C. Potential areas for panel discussion



What are some unlocks needed to accelerate gas accessibility and connect remaining CGD GAs?



What is the role that bridge solutions e.g., LCNG can play once the pipeline connectivity is established?

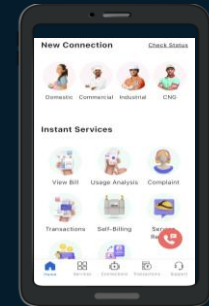


What is the role that industry and regulators can play to accelerate CBG production for energy security?

D. Transform operations through Automation and Digitization

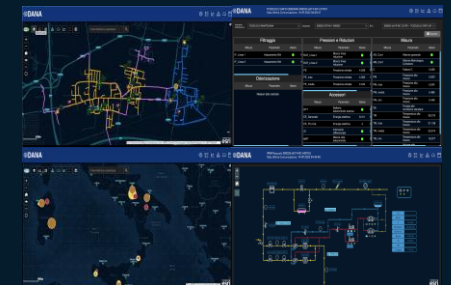
Customer facing solutions

- 1 End-to-end digital customer lifecycle** – onboarding, metering and billing, complaints management
- 2 Real-time CNG pump availability** – waiting time, nearest optimal pump location
- 3 Automated safety reminders** – hydrotesting reminders, hose-pipe change reminders



Back-end solutions

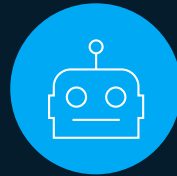
- 1 SCADA – GIS integration** - real-time network monitoring, remote-controlled actions, insights generation, gas loss reconciliation and reduction
- 2 ERP implementation** – digitize process across maintenance, inventory management, employee life-cycle, procurement and vendor management
- 3 AI-led fleet monitoring** – route and safety adherence, route-planning and utilization



D. Potential areas for panel discussion



Which automation and digitization use-cases have the highest ROI for CGDs?



What is the role AI can play across these use-cases for further boost in operational efficiency?



How can CGDs move from technology pilots to scalable deployment of these use-cases?

E. Coordinated policy and administrative support

Domestic gas supply visibility

- Ensure **forward visibility** on APM and NWG allocation
- Clarify **long-term domestic gas prioritization** framework

Infrastructure enablement

- **Streamline approvals** for steel & MDPE pipeline laying
- Harmonize **state level ROW** processes
- **Selective exclusivity extensions** in delayed connectivity cases

Demand side acceleration

- Bring Natural Gas under **GST regime**
- **Reduce GST** on CNG/ LNG vehicles
- Mandate shift to clean fuels for select segments e.g., **government fleets, high-emission urban clusters**
- Strengthen **enforcement on high-emission fuels** (petcoke, furnace oil)



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