



GAIL (India) Limited

Investors' & Analysts' Presentation FY 2025-26

Energizing Possibilities ...

22nd May 2026

A yellow gas pipeline with several red-handled valves runs horizontally across the top of the page. On the left side, the pipeline turns vertically downwards, with more valves. The background is white.

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ENERGIZING POSSIBILITIES...

Committed Leadership



Shri Deepak Gupta- Chairman & Managing Director, and Director (Projects)

Shri Deepak Gupta, a Mechanical Engineer from Delhi College of Engineering, brings over 35 years of extensive experience across the oil & gas value chain, combining strong technical depth with strategic and board-level leadership. His profile reflects proven execution capability, large-scale infrastructure leadership, and a clear focus on digital and clean energy transformation—supporting GAIL’s long-term growth, operational resilience, and transition strategy.



Shri Rakesh Kumar Jain - Director (Finance)

Shri Rakesh Kumar Jain, Director (Finance), brings 34+ years of experience across oil & gas and regulatory domains. He drives finance, treasury, investor relations and risk management, strengthening GAIL’s financial resilience and governance. Recognised with the Extel Best CFO (2025) and SAP Leadership Award (2025) he also leads key GAIL Group companies supporting strategic growth and value creation.



Shri Ayush Gupta - Director (Human Resources)

Shri Ayush Gupta, Director (HR), brings 30+ years of experience across HR, talent development and operations. He leads digital HR transformation and talent strategies, strengthening organisational capability and employee experience. A Chevening Fellow (Oxford) and award-winning HR leader, he also holds Board position in GAIL Group companies , supporting GAIL’s long-term capability building and growth.



Committed Leadership



Shri Sanjay Kumar - Director (Marketing)

Shri Sanjay Kumar, Director (Marketing), with 35+ years of experience across the gas and LNG value chain, brings deep cross-functional expertise spanning marketing, LNG trading, transmission, and operations. He has been instrumental in building GAIL's global LNG trading presence and has led key leadership roles including MD of IGL. His profile reflects strong commercial acumen and execution capability, supporting GAIL's market leadership and growth strategy.



Shri Rajeev Kumar Singhal - Director (Business Development)

Shri Rajeev Kumar Singhal, Director (Business Development), brings 30+ years of experience across the gas and LNG value chain, spanning operations, LNG sourcing/trading, marketing, and strategic initiatives. He has led key milestones including LNG contract renegotiations, petrochemical acquisitions, and India's first small-scale LNG project. His profile reflects strong strategic execution and diversification capability, supporting GAIL's growth and energy transition.



GAIL

The Big Picture



GAIL's Business Portfolio

NG Marketing

- LNG Portfolio ~16.56 MMTPA
- Domestic Market Share (RLNG) ~48%

NG Transmission

- 18,000+ KM Pipeline Network
- Market Share~65%

Petrochemicals

- PE & PP 870 KTA
- ~15% share in Domestic Market
- 280 KTA at BCPL

LHC

- 4 Processing Units 1.3 MMTPA
- 4.58 MMTPA LPG Transmission

Renewables

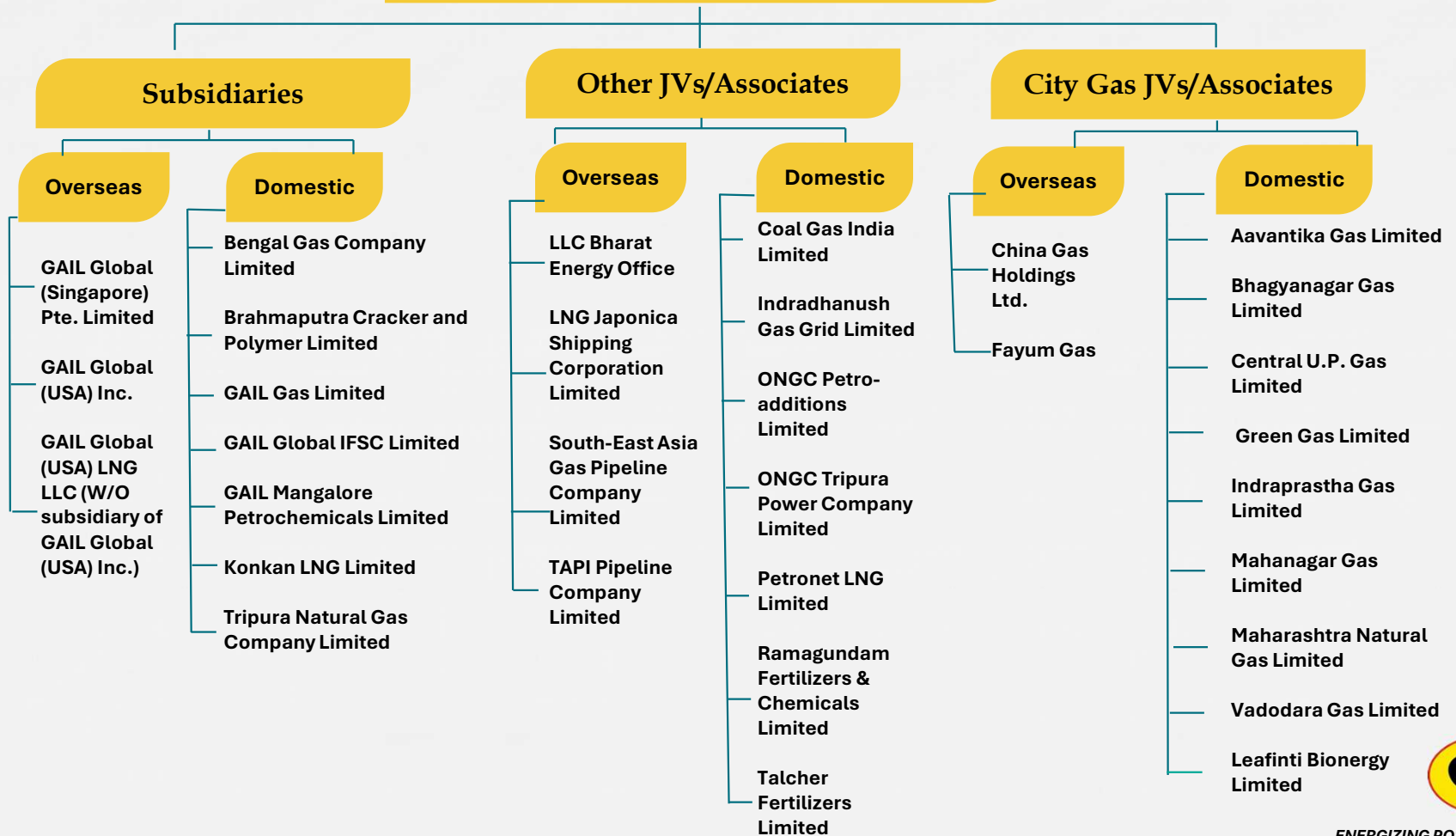
- 118 MW Wind Power
- 37 MW Solar Power
- 4.3 TPD Green Hydrogen
- 5 TPD CBG Plant

E& P and CGD

- Participation Interest in 13 E&P Blocks
- 6 Direct GAs along JHBDPL
- 72 GAs out of total 307GAs

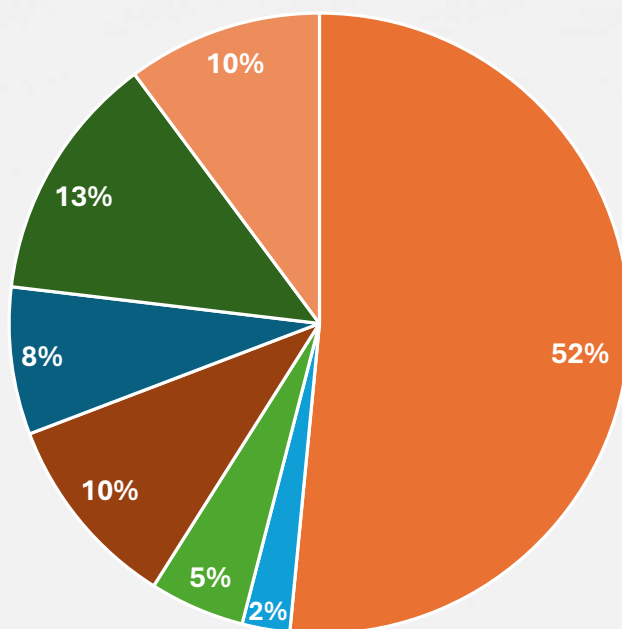


GAIL Group Structure



Shareholding Profile & Market Standing

% Shareholding



■ PRESIDENT OF INDIA
■ ONGC
■ LIC
■ OTHERS

■ IOCL
■ MUTUAL FUNDS/UTI
■ FOREIGN PORTFOLIO INVESTORS

Key Market Metrics

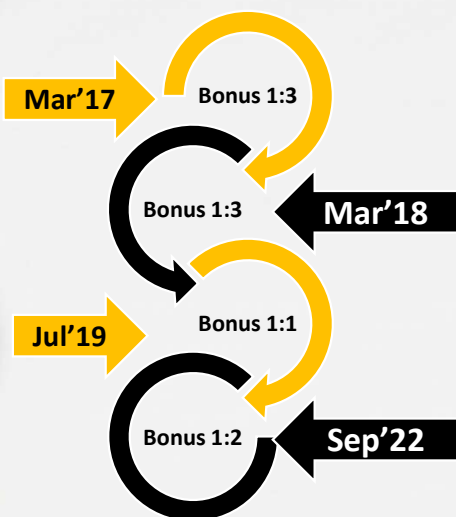
President of India's Share	51.52%
Average Share Price FY'26	Rs 176
Share Price as on 30.03.2026	Rs 137.71
Average Market Capitalization (BSE-FY 2025-26)	~Rs 1,15,735 Cr
Listed at	NSE/BSE/ GDRs on LSE
Dividend Payout FY'26	51.90 % (Rs 5.50/share)



ENERGIZING POSSIBILITIES...

Return to Shareholders

Bonus Share Issuance



3 shares pre-March 2017 turned into 16 shares post-September 2022, highlighting strong value growth for investors

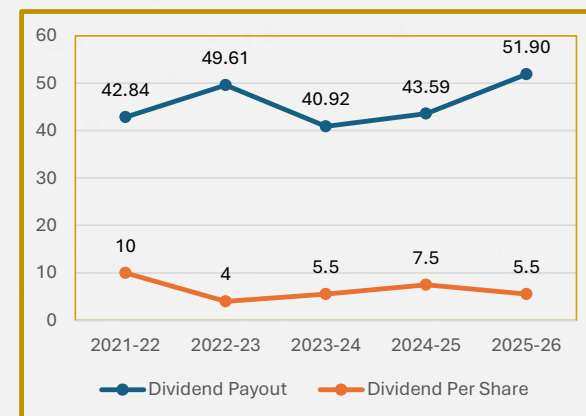
Buyback (Rs./Crores)



Bought back ~6.98 crore shares @Rs. 150 during FY2020-21
Bought back ~5.70 crore shares @Rs. 190 during FY2022-23

Dividend Payout

on accrual basis



Dividend paid during the year on cash basis-Rs 3,945 crores



ENERGIZING POSSIBILITIES...

Credit Ratings

International

Domestic

MOODY'S
INVESTORS SERVICE

Baa3 (Stable)*

**India Ratings
& Research**
A Fitch Group Company

'AAA'



ICRA

Stable

Fitch
Ratings

BBB- (Stable)*



* Capped to India's Sovereign Rating



ENERGIZING POSSIBILITIES...

Awards & Accolades

Best Investor Relations Program
India (overall)
Extel 2025 Asia Executive Team Survey



Scope Eminence Awards

- Corporate Governance
- Corporate Social Responsibility & Responsiveness



5th PSU Transformation Awards
Best performing PSU of the year




PNGRB Excellence Award 2025
Gas Transporter of the Year





ESG


Environmental




 Net Zero strategy aims to achieve 100% reduction in Scope-1 and Scope-2 emissions by the year 2035 and a 35% reduction in Scope-3 emissions by the year 2040


 GAIL has set a target to attain 3.6 GW of Renewable Energy capacity by 2035


 Work commenced to increase the RE portfolio from the existing 155 MW to 1,063 MW


 GAIL Planted over ~1,25,000 trees

Social


 More than 25 Lakh people benefitted through GAIL's CSR projects


 Achieved a Customer Satisfaction Index (CSI) score of 92.51%


 Purchase from MSMEs has increased to 59% from 48.87%, while procurement from MSEs owned by women entrepreneurs stands at 6.3%


 Spent INR 1.43 Crores on Sustainability related training programs for employees

Governance

 HSE Score of 96.78% for FY 2025-26 against an internal target of 96.37%

 Conferred with 2nd Rank among India's Most Sustainable Companies in Oil & Gas sector by BW BusinessWorld

 Received 310 complaints from Stakeholders through CPGRAMS Portal and 100% were promptly resolved.

 Continue to retain position for FTSE4 Good Index, an International ESG Benchmark



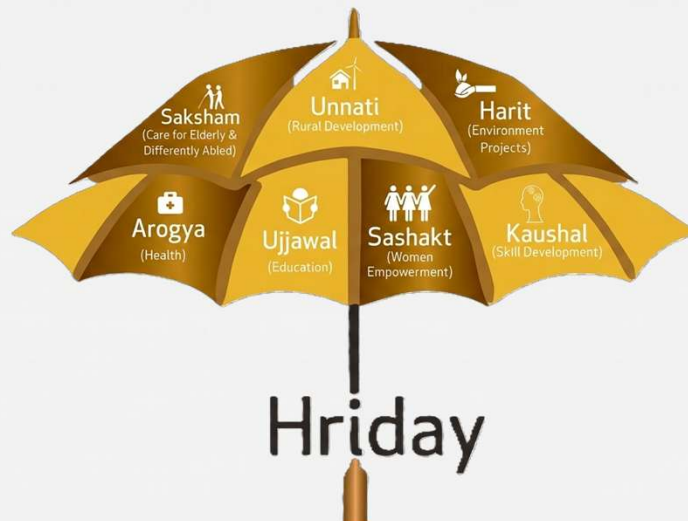
CSR Initiatives – GAIL Hriday

UNNATI – Rural
Development

SAKSHAM – Elderly &
Differently abled Care

HARIT – Environment
Projects

AROGYA –
Health



KAUSHAL – Skill
Development

UJJWAL –
Education

SASHAKT – Women
Empowerment

**~25 Lakh lives
impacted positively
through GAIL's CSR
initiatives**

Hriday

GAIL's CSR Philosophy

**GAIL spent ~ Rs.189
crores under CSR
initiatives in FY 2025-
26**

Others



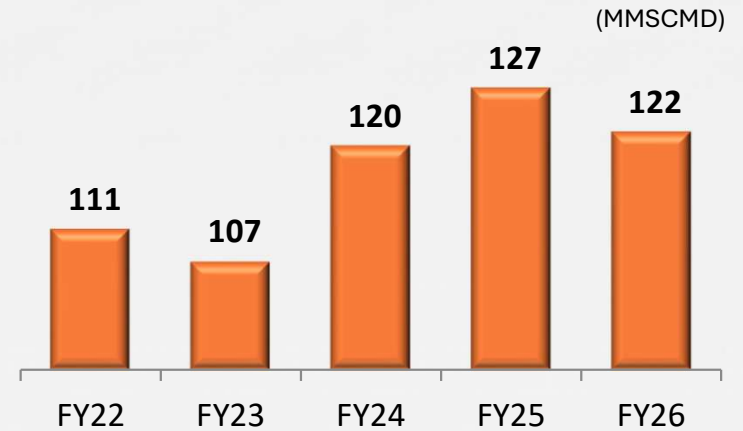
A stylized yellow gas pipeline with red valves and a red vertical line forming a frame. The pipeline is composed of several segments: a vertical section on the left with three valves, a horizontal section at the top with two valves, and a horizontal section at the bottom. A red vertical line intersects the bottom horizontal section. The GAIL logo is positioned at the intersection of the red line and the bottom horizontal section. The text "Business Landscape" is centered within the frame.

Business Landscape

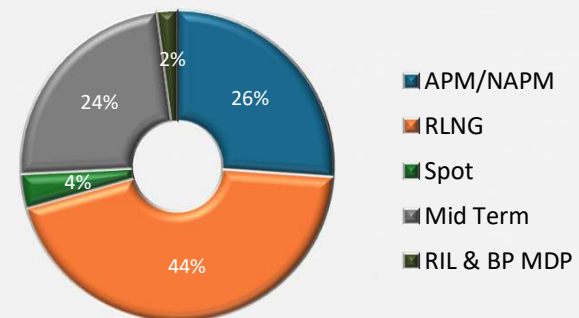


Natural Gas Transmission

- 18,000+ kms of Natural Gas Pipeline Network (~65% Market Share)
- ~14,200 km Integrated Pipeline Network
- ~1,500 Km Pipeline is under construction.
- 122.18 MMSCMD Natural Gas Transmission in FY'26
- Capacity expansion of DUPL Pipeline

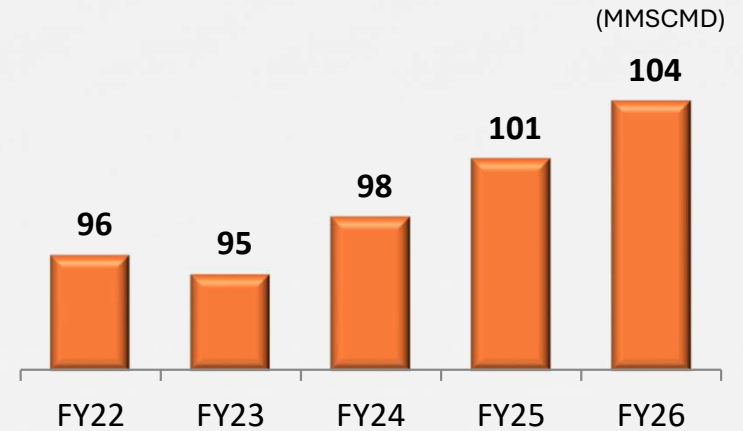


Gas Transmission Mix - FY2026

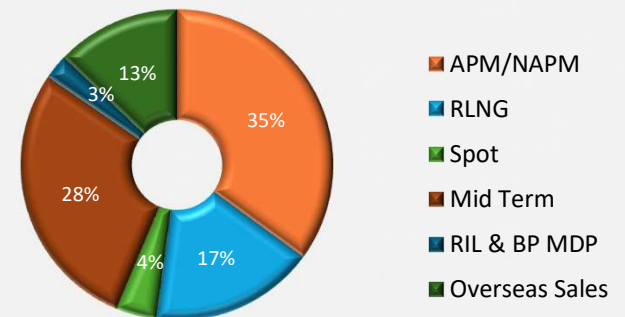


Natural Gas Marketing

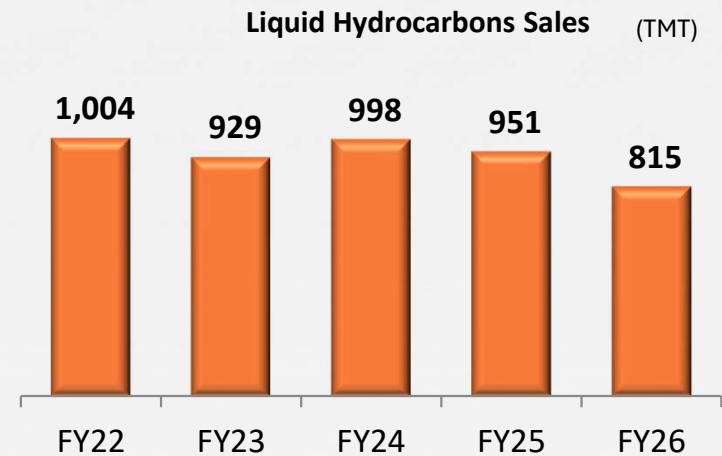
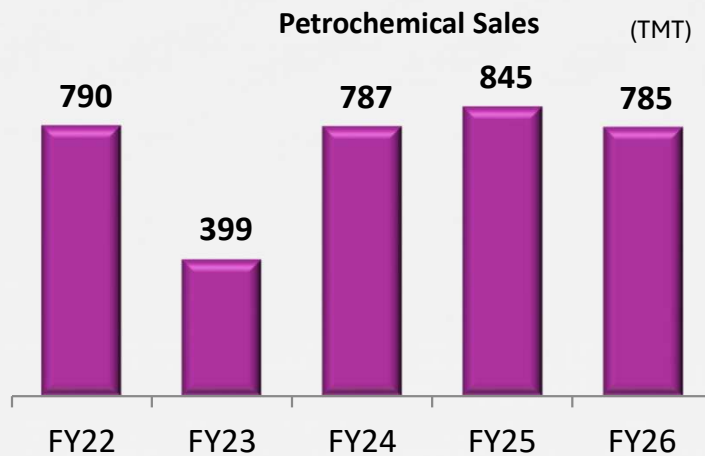
- ~ 104.21 MMSCMD Natural gas sales during FY'26
- 16.56 MTPA of upstream LNG Portfolio
- ~48% Market Share in India's Natural Gas Consumption
- 5 long chartered and 2 short chartered vessels
- To source additional 4-5 MTPA LNG by 2030
- Capacity expansion of Dabhol LNG terminal



Gas Marketing Mix - FY2026



Petrochemicals & Liquid Hydrocarbons









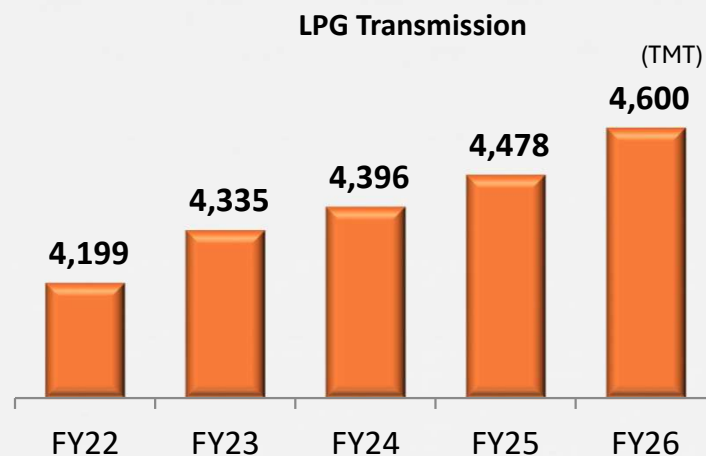
- 94 % Plant capacity utilization
- 810 KTA Polyethylene
- 60 KTA Polypropylene
- BCPL marketed volume-302 TMT
- Upcoming Petrochemical Plants:
 - PDH-PP Usar: 500 KTA
 - GMPL PTA Plant: 1,250 KTA

- 1.34 MTPA Production Capacity
- 4 LHC Processing Plants
- 813 TMT Production in FY 2026
- Capacity utilization-61%



LPG Transmission

-  Highest ever LPG Transmission in FY 2026
-  4.58 MMTPA of LPG Transmission Capacity
-  LPG Pipelines capacity utilization-100%
-  Jamnagar Loni Pipeline - 3.25 MMTPA
-  Vizag-Secunderabad Pipeline - 1.33 MMTPA
-  PNGRB's authorization received for doubling the capacity of JLPL





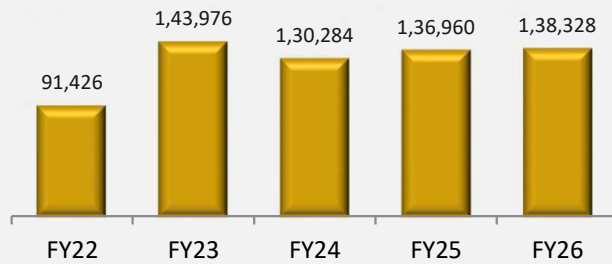
Financial Performance Highlights



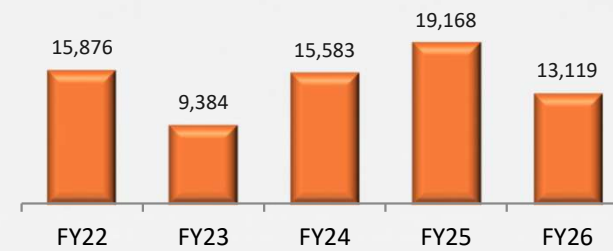
Financial Performance (Standalone)

(in Rs. crore)

Turnover (Gross)



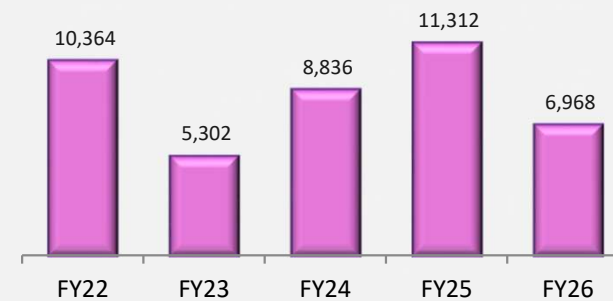
Gross Margin (EBITDA)



Profit Before Tax (PBT)



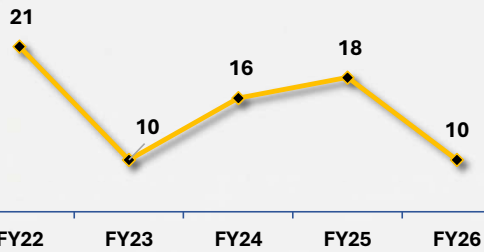
Profit After Tax (PAT)



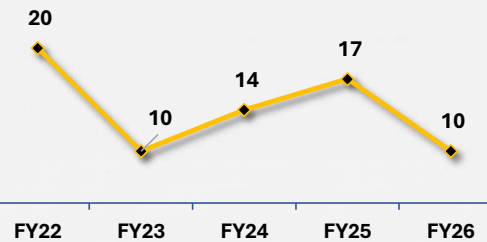
ENERGIZING POSSIBILITIES...

Key Financial Ratios

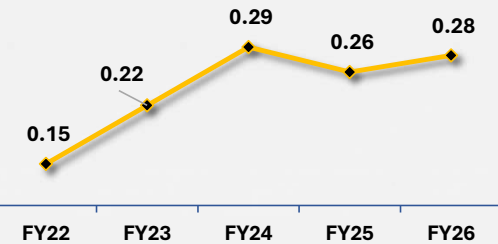
PAT to Net Worth* (in %)



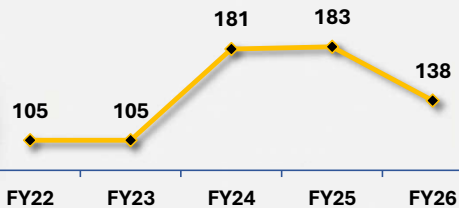
Return on Capital Employed* (in %)



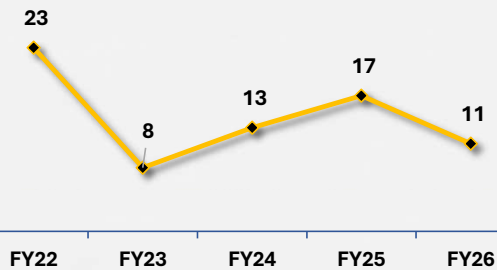
Debt Equity Ratio



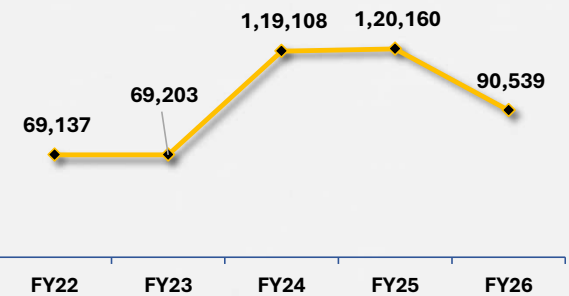
Share Price (in Rs./Share)\$



Earning Per Share*\$ (₹/Share)



Market Capitalization (₹/Crore)#



*Figures include Exceptional items

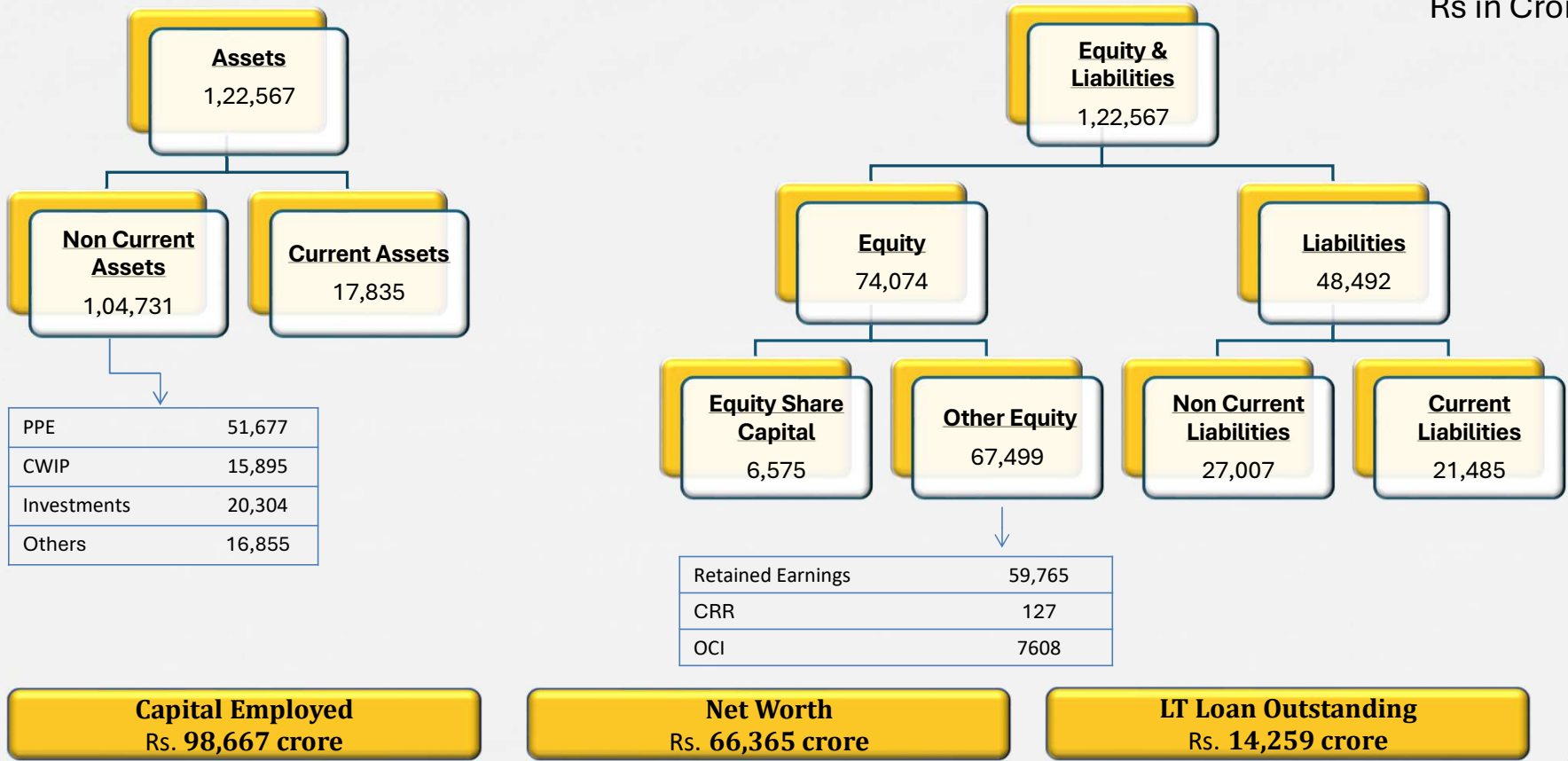
\$ Share Price & EPS for past periods are adjusted for Bonus issue & Buy Back

#As on closing date of the period



Balance Sheet as on 31st March 2026

Rs in Crores

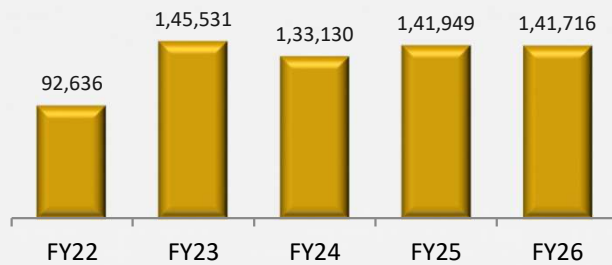


ENERGIZING POSSIBILITIES...

Financial Performance (Consolidated)

(in Rs. crore)

Turnover (Gross)



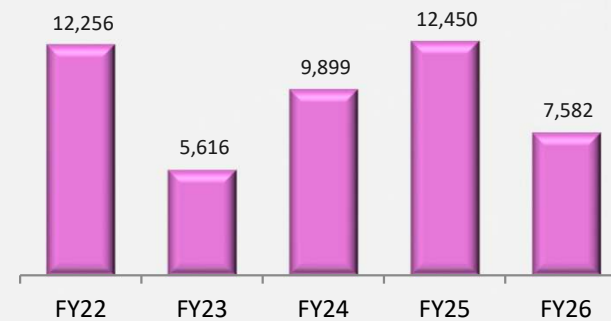
Gross Margin (EBITDA)



Profit Before Tax (PBT)



Profit After Tax (PAT)



ENERGIZING POSSIBILITIES...

One Off Transactions –FY 25-26

Particulars	Q1 FY'26	Q2 FY'26	Q3 FY'26	Q4 FY'26	FY'26
❖ Gas Marketing Segment					
• Provision for Doubtful Dues				(675)	(675)
• Entry Tax Provision reversal				291	291
❖ Gas Transmission Segment					
• Differential Tariff Settlement	133				133
• Excess Provision Written back	22			87	109
• Depreciation*				475	475
• Provision for Probable Obligation				(111)	(111)
❖ Petrochemical					
• Depreciation*				189	189
❖ Others					
LPG Transmission: Provision for dues & probable obligation				(58)	(58)
Reduction in Depreciation of LPG Transmission*				20	20
Net Impact Positive/ (Negative)	155	-	-	218	373

*Based on technical assessments, the useful life of Natural Gas and Liquefied Petroleum Gas Pipelines and Polyethylene Plants has been revised from 30 years to 40 years and from 25 years to 35 years, respectively.



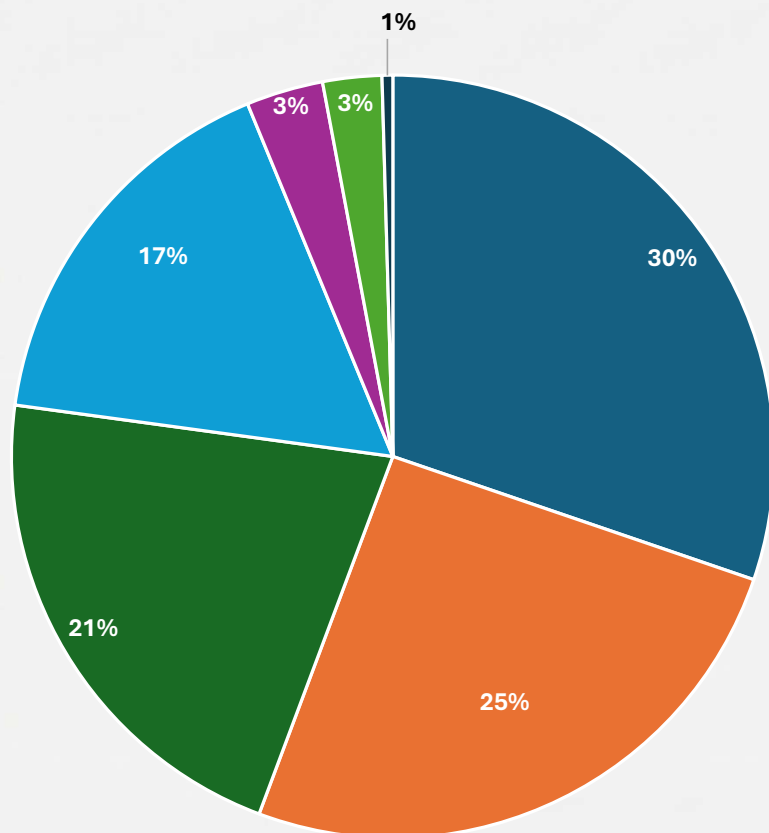
ENERGIZING POSSIBILITIES...

A yellow gas pipeline runs horizontally across the top of the slide, with a vertical section on the left side. Several red-handled valves are attached to the pipeline. A thick red vertical line is positioned to the left of the main text area, extending from the top of the slide down to the GAIL logo.

Strategic Investments & Growth Roadmap



Capital Expenditure: FY2025-26

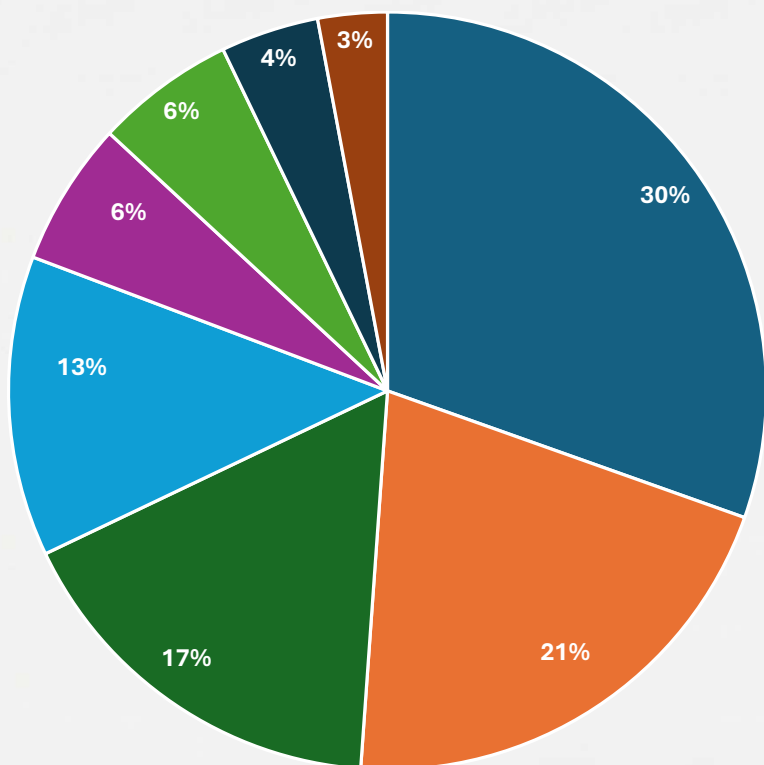


Capex Breakup	Rs in Crores	%
Pipelines	2,900	30
Operational Capex	2,443	25
Petrochemicals	2,059	21
Equity Contributions to JVs/ Subsidiaries	1,594	17
CGD Projects	313	03
Exploration & Production	240	03
Net Zero/Renewables	44	01
TOTAL	9,594	100



ENERGIZING POSSIBILITIES...

Capital Allocation: FY2026-27



Capex Breakup	Rs in Crores	%
Operational Capex	3530	30
Pipelines	2401	21
Net Zero/Renewables	1950	17
Petrochemicals	1486	13
Equity Contributions to JVs/ Subsidiaries	713	06
Other Projects	692	06
Exploration & Production	484	04
CGD Projects	344	03
TOTAL	11,600	100



ENERGIZING POSSIBILITIES...



Major Projects in Pipeline

Pipelines

- JHBDPL Pipeline
- KKMBPL Phase-II Pipeline
- Gurdaspur Jammu Pipeline
- JLPL LPG Pipeline capacity augmentation
- Vijaipur – Bina Pipeline
- DUPL-DPPL Capacity Pipeline Augmentation
- LPG Pipelines
- Dabhol-Vijaipur Ethane Pipeline

Net Zero

- 600 MW Solar Project with 550 MWh BESS, Uttar Pradesh
- 100 MW Solar Project with 22 MWh BESS, Maharashtra
- 178.2 MW Wind Power Project, Maharashtra

Petrochemicals

- GMPL – PTA Plant (1,250 KTA)
- PDH-PP Plant Usar (500 KTA)
- C2-C3 Pipeline (Vijaipur – Pata)

Others

- **Compressed Bio-Gas plants** - 1 commissioned, 6 under construction, 31 under evaluation
- **29 LNG Stations** – 4 under construction, 6 under planning/evaluation
- Equity investments in Subsidiaries/JVs
- **2 Fertilizer Plants** (Capacity of 1.2 MMTPA each) (Under Evaluation)

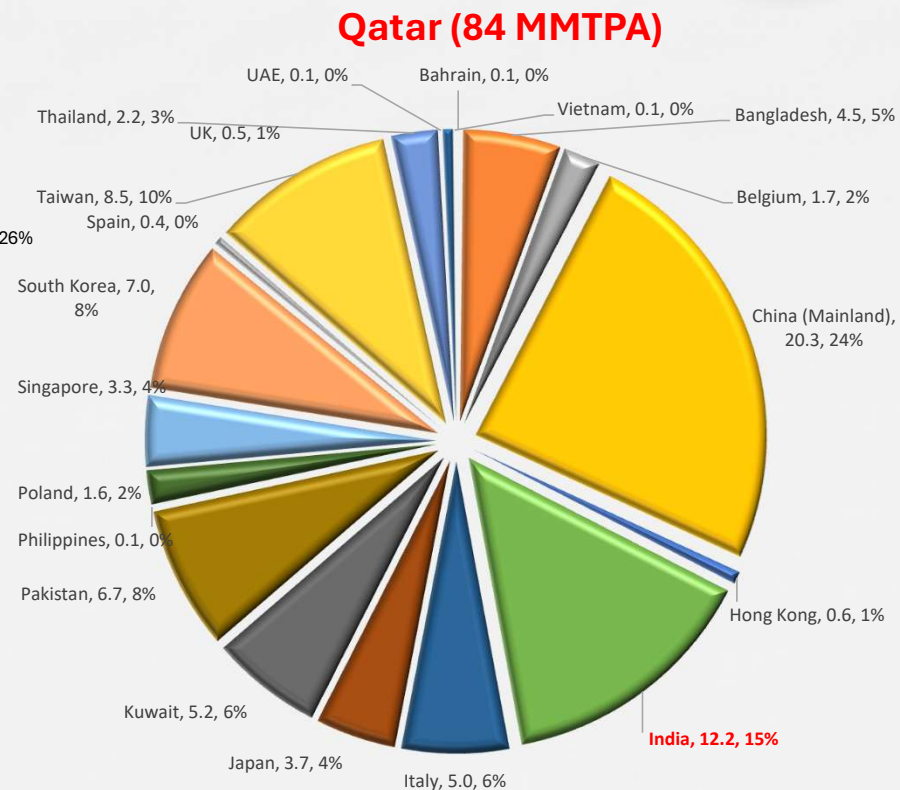
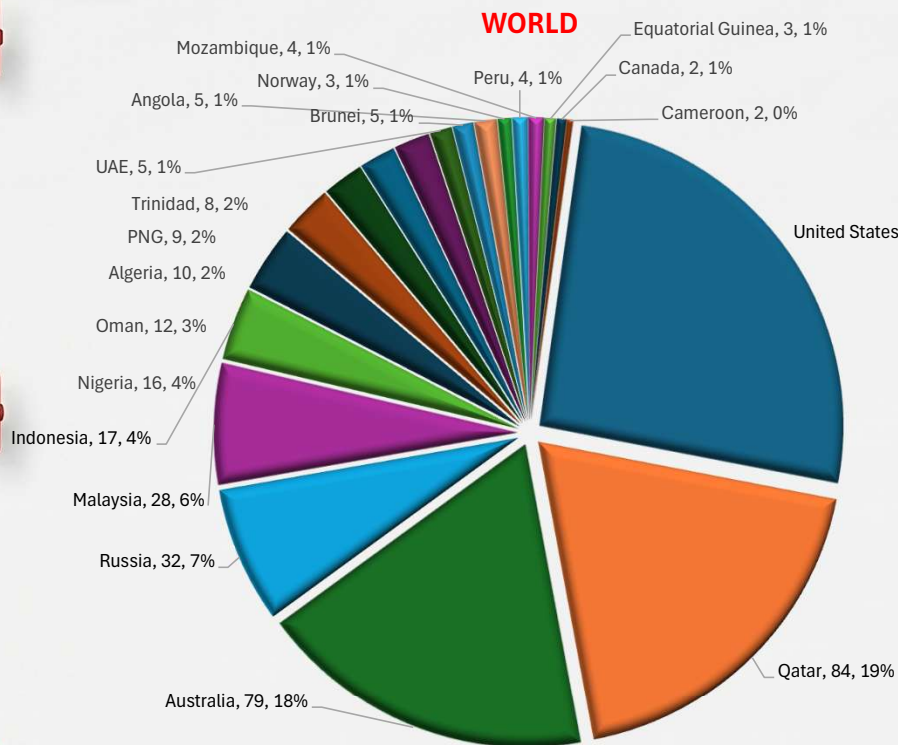


A yellow gas pipeline with several red-handled valves is shown. A thick red vertical bar is positioned to the left of the main text. The pipeline runs horizontally across the top and bottom of the page, with a vertical section on the left side. The GAIL logo is located at the intersection of the red bar and the bottom horizontal pipe.

Industry Outlook & Strategic Direction



Global LNG Trade – CY 2025



- In 2025, around 440 MMTPA of LNG was traded
- 277 MMTPA (~63%) of LNG is produced by US, Qatar & Australia
- Out of 84 MMTPA, Qatar supplied around 12 MMTPA LNG i.e. ~15% to India

Source: S&P Global



ENERGIZING POSSIBILITIES...

Global Gas Demand – Outlook

- 🔧 2025 marked a transitional year for global gas: tight first-half markets gave way to easing H2 conditions as new LNG supply arrived.
- 🔧 LNG demand growth was led by Europe and North America due to colder winters and higher gas-based power demand, while Asia-Pacific demand remained largely flat.
- 🔧 Europe's LNG imports reached a record high due to reduced Russian pipeline gas and lower storage levels.
- 🔧 China's LNG demand grew modestly despite weaker industrial activity and rapid renewable energy expansion.
- 🔧 Global LNG supply increased by ~7% (~28 MTPA), reaching ~437 MTPA, driven by new projects in the US and Canada.
- 🔧 LNG prices softened in 2025, with Asian JKM prices falling significantly by year-end.
- 🔧 LNG contracting activity hit a decade high, reflecting strong long-term confidence in LNG demand
- 🔧 Market volatility remained high due to geopolitical and supply chain disruptions

(Sources: IEA Global Energy Review 2026, S&P Global Commodity Insights, IEA Global Gas Security Review 2024)



ENERGIZING POSSIBILITIES...



Global Gas Outlook (2026–2030)

- 🔧 Global LNG supply is expected to rise significantly by 2030, with ~220 MMTPA of new liquefaction capacity mainly from the US and Qatar.
- 🔧 The US is expected to increase its share of global LNG supply from ~20%(~103 MMTPA) in 2024 to ~33%(~234 MMTPA) by 2030, reshaping global LNG trade and pricing dynamics.
- 🔧 Europe's plan to phase out Russian gas by 2027 will keep LNG imports elevated, supporting strong demand for Atlantic Basin and US LNG supplies.
- 🔧 Medium-term gas markets will be shaped by two contrasting trends:
 - 🔧 Rising gas demand from developing economies in Asian countries.
 - 🔧 Increasing shift toward renewables and electrification in developed economies (OECD markets)

The above outlook could be significantly impacted if the West Asia crisis prolongs. Delayed reopening of the Strait of Hormuz would impact LNG supply growth

(Sources: IEA Global Energy Review 2026, S&P Global Commodity Insights, IEA Global Gas Security Review 2024)



ENERGIZING POSSIBILITIES...

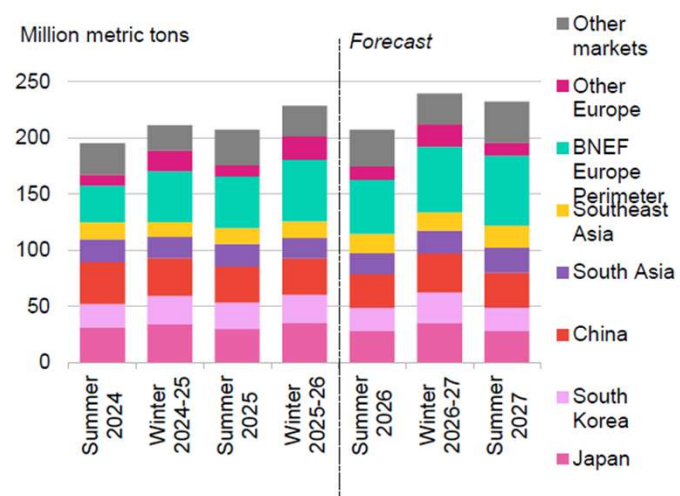
Global Gas Demand - Outlook

Following the supply shock of 2022/23, natural gas markets moved towards a gradual rebalancing and returned to structural growth

Due to West Asia War, supplies from UAE & Qatar are impacted which will have impact on the Global LNG demand. However, the decline in Asian demand is expected to be offset by growth in European markets

On LNG supply side, the supply cuts on Qatari volume during 2026 are being balanced gradually by other regions- USA, Mexico, Nigeria, Australia etc.

Global LNG demand – base case



Source: Bloomberg NEF

KEY NEW SUPPLY PROJECTS (2026–2027)


Project	Capacity (MMTPA)	1st Cargo Supply Start Month
ECA Ph.1 (Mexico)	3.3	May 2026
NFE T1 (Qatar)	8	Feb 2027
NLNG T7 (Nigeria)	8	May 2027
Genting LNG (Indonesia)	1.2	Mar 2027
PFLNG Tiga (Malaysia)	2.1	Jun 2027
Rio Grande P1 (US)	16.2	Jun 2027
Port Arthur P1 (US)	12.0	Sep 2027
Pluto LNG T2 (Australia)	5.0	Oct 2026



ENERGIZING POSSIBILITIES...

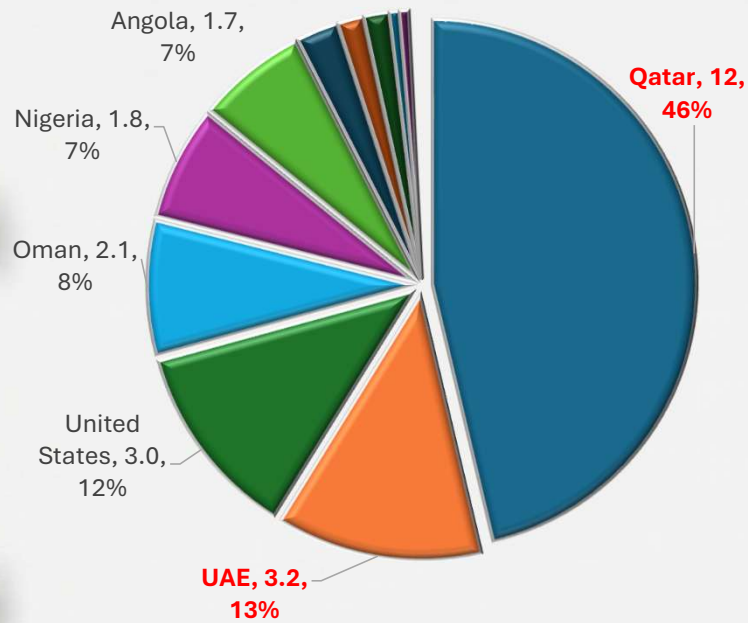
Strait of Hormuz: Critical Chokepoint for LNG Supply



-  The Strait of Hormuz is a critical chokepoint for global LNG markets, and any disruption can create far-reaching impacts on global energy security. During current crisis, Strait of Hormuz is closed effecting global LNG supply significantly.
-  The strait enables the export of ~82 MTPA from Qatar and ~5 MTPA from UAE, together representing ~20% of global LNG supply.
-  This concentration underscores the systemic vulnerability of global LNG supply chains to any disruption in the strait.

India's LNG imports - CY 2025

India's LNG import – CY 2025
(MMT)



🔧 India's LNG imports in CY 2025 stood at approximately **25.5 MMTPA**.

🔧 Qatar and UAE accounted for close to **60%** of India's overall LNG imports.

🔧 As of December 2025, India's total long-term LNG portfolio stood at **23.1 MMTPA** (~83.16 MMSCMD).

🔧 ~8.5 MMTPA are source-specific to Qatar and UAE

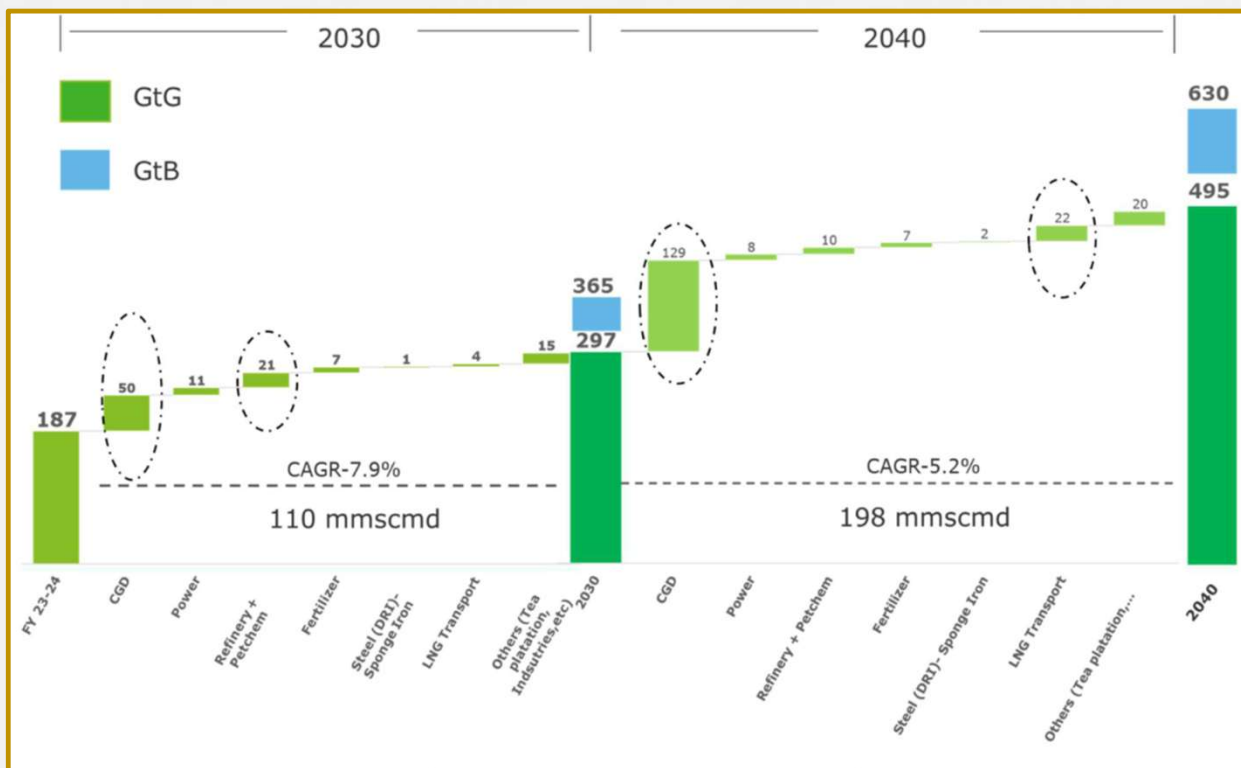
🔧 Remaining volumes are delivered under various Portfolio contracts

Source: S&P Global



ENERGIZING POSSIBILITIES...

India's Expected Natural gas demand in 2030 & 2040



GtG: Good to Go Scenario – Moderate growth & expected developments

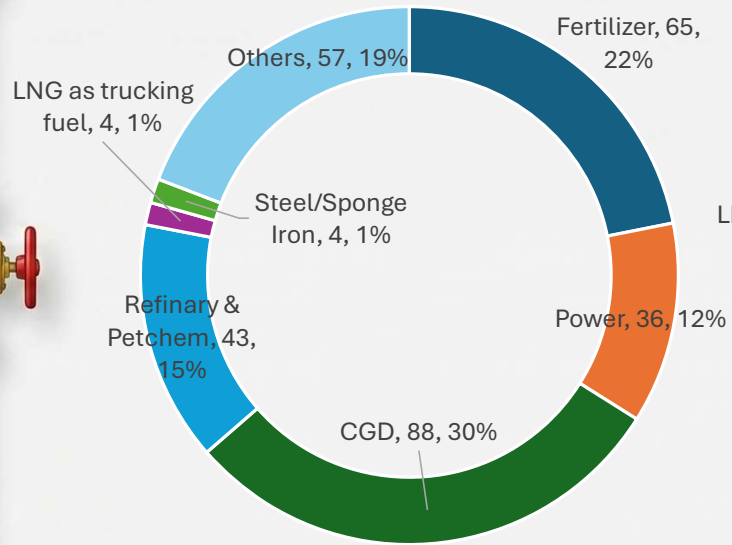
GtB: Good to Best Scenario – Accelerated growth & favorable policy implementation

Source: India's Natural Gas Demand Projection for 2030 - 2040 by PNGRB

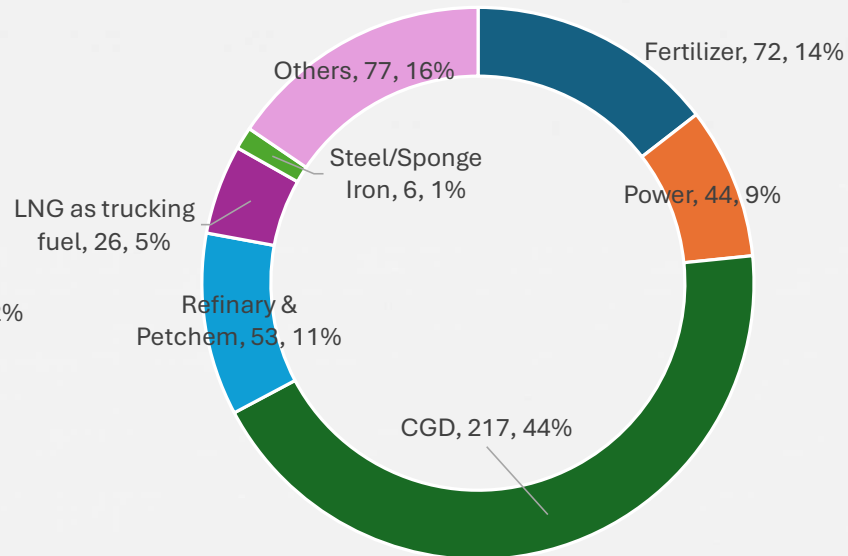


Expected Natural Gas consumption in MMSCMD (GtG Scenario)

2030 (~ 297 MMSCMD)



2040 (~ 495 MMSCMD)



■ Fertilizer ■ Power ■ CGD ■ Refinery & Petchem

🔧 CGD sector is expected to be the highest consuming sector with over 40% share (over 200 MMSCMD)

🔧 Demand is also expected to significantly increase in the usage of LNG as a trucking fuel during 2030-2040

Source: India's Natural Gas Demand Projection for 2030-2040 by PNGRB



ENERGIZING POSSIBILITIES...

Gas infrastructure in India - "One Nation-One Grid"

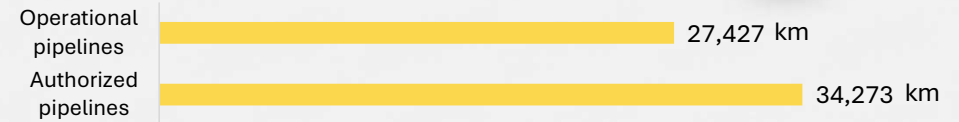
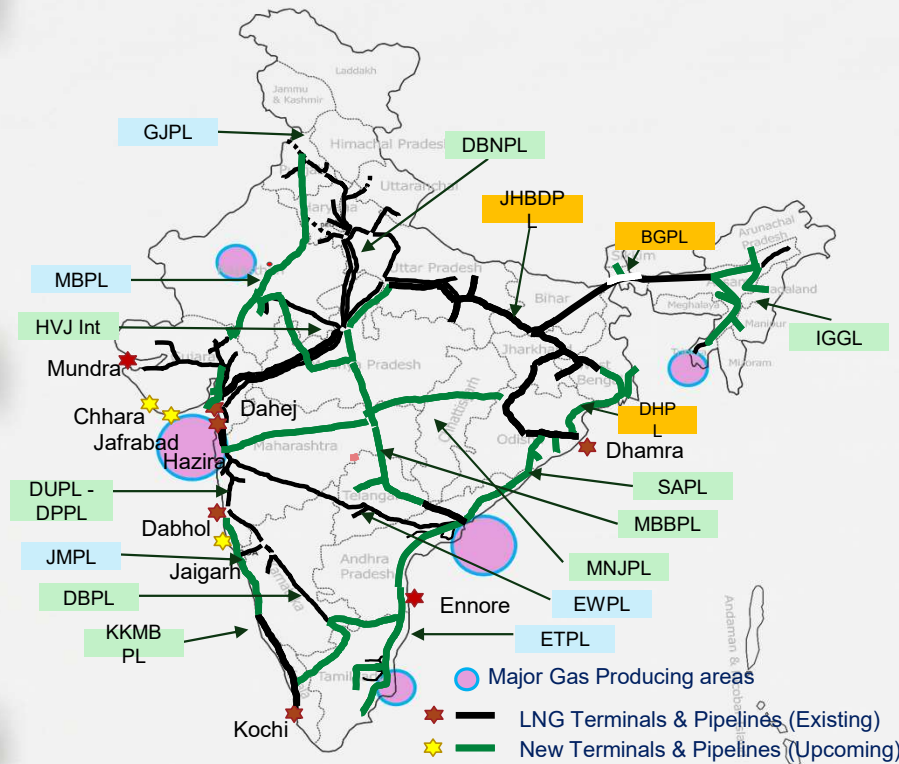


Fig: PNGRB | Natural Gas Pipelines Network in India - as on 31st December, 2025

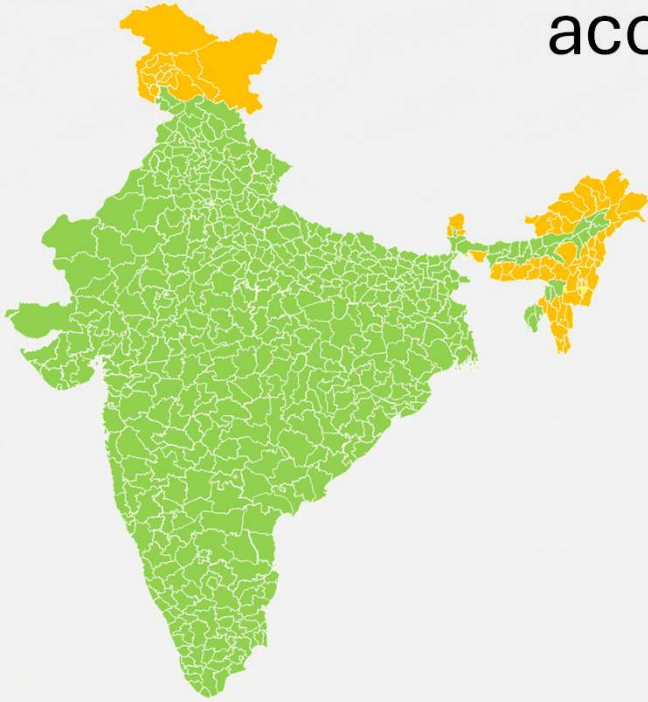
S. No.	Existing Re-gas Terminals	Re-gas Capacity (MMTPA)	Capacity Utilization (Apr 2025 - Apr2026)
1.	Dahej (Gujarat)	22.5 (w.e.f 31.03.2026)	92%
2.	Hazira (Gujarat)	5.2	37%
3.	Dabhol (MH)	5	37%
4.	Kochi (Kerala)	5	27%
5.	Ennore (A.P.)	5	28%
6.	Mundra (Gujarat)	5	21%
7.	Dhamra (Odisha)	5	38%
8.	Chhara (Gujarat)	5	16%
Total		~ 57.7	

S. No.	Upcoming Re-gas Terminals	Re-gas Capacity (MMTPA)
1.	Dabhol Expansion 1	1.3
2.	Dabhol Expansion 2	6.3
3.	Jaigarh	4
4.	Jafrabad	5

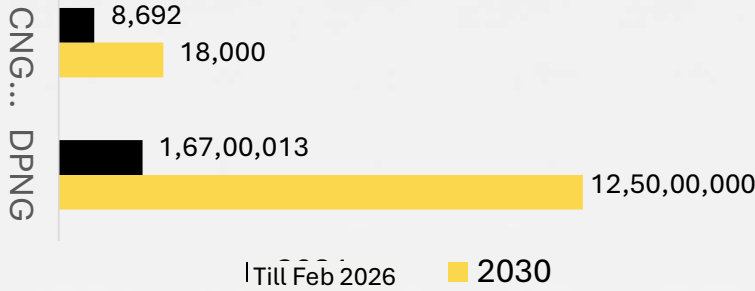


ENERGIZING POSSIBILITIES...







City Gas Distribution – Making gas accessible to public



■ CGD up to 11th round (300 GASs)
■ Authorized in 12th round (7 GASs)



CGD Growth:

-  CGD sector, expected to grow at a CAGR of ~15% till 2030, will lead the growth of gas consumption in India
-  Most of the growth will come from the CNG sector and small industries
-  The government has implemented several measures to promote the use of CNG and D-PNG across the country
 -  Reallocating the cheapest (APM priced) domestic gas from power and other non-priority sectors to CNG and residential city gas users
 -  Priority for CNG and D-PNG use in the distribution of HP/HT gas
 -  New Well Gas allocation with priority for usage in CNG and D-PNG

Source: *PPAC|Snapshot of Oil and Gas Data Mar 2026, IEA India Gas Market Report 2025



ENERGIZING POSSIBILITIES...



Current Gas Scenario

- ~ 60% of India's LPG requirement is imported.
- ~ 90% of LPG imports traditionally come from the middle East.
- India has strategically diversified its LNG sourcing portfolio.
- GAIL had prudently entered into US LNG contracts more than a decade ago.
- GAIL's diversified LNG portfolio has come as a big saviour in averting an energy crisis during the current war.

Going forward,

- Natural gas is likely to replace Propane/LPG for usage in Industrial sector.
- Natural gas is likely to replace LPG for cooking in cities.



ENERGIZING POSSIBILITIES...

Conclusion

- 🔧 Middle East conflict and Hormuz closure have significantly disrupted the LNG industry; recovery will take time.
- 🔧 Even after the war subsides, LNG production normalization is expected to be gradual, with Qatar indicating a multi-year recovery timeline.
- 🔧 India should strengthen a diversified LNG sourcing portfolio to improve energy security.
- 🔧 New global liquefaction projects are expected to increase LNG availability and soften prices in the coming years.
- 🔧 India's LNG/RLNG demand is expected to grow strongly, led by the CGD sector and supported by refineries, petrochemicals, steel, power, and other industries.
- 🔧 Government push for LPG-to-PNG conversion will further accelerate gas demand growth.
- 🔧 CBG sector, currently at more than 0.6 MMSCMD, is expected to grow significantly with the help of supportive policies like mandatory CBG blending obligation etc.

Key priorities: LNG sourcing from diversified geographies, infrastructure development, strategic gas storage, Compressed Biogas and favourable government policies.



Petrochemical Business Outlook

- India's per capita consumption of Polymers is just 15 kg vs. China per capita consumption of 83 kg.
- World average per capita consumption of Plastics is ~39 Kg with US consuming as high as 93 Kg per capita

India's per capita consumption is one of the lowest in Asia
Based on last 5 year CAGR, Future Polymer demand growth in India is estimated at ~7-8% p.a.

Major Highlights of GAIL's Petrochemical Business in FY 2025-26

- Sold ~1085 KTA of polymers (785 KTA - GAIL & 300 KTA - BCPL)
- Polymer capacity enhancement under progress with upcoming 500 KTA PDH-PP plant at Usar. 60 KTA PATA Plant commissioned in Q4 of FY 26.
- Market preparedness to enter PTA Business is complete. Plant Operations to start soon.

Future demand drivers

- Packaging Industry
- Ecommerce driving packaging
- Automobile /Construction Industry
- Agriculture Industry

Growth drivers coupled with capacity addition will result in growth in Top line for GAIL.

Source: CPMA & internal data






ENERGIZING POSSIBILITIES...



**New
Initiatives**

Compressed Bio Gas (CBG)

-  GAIL achieved ~88,174 MT of CBG sales through CBG-CGD Synchronization scheme in 2025-26, more than double of MoU target
-  443 TPAs signed with 344 CBG Biogas producers and 42 CGD entities
-  6 CBG Plants under construction with collective production capacity of 95 TPD

Thank You

