

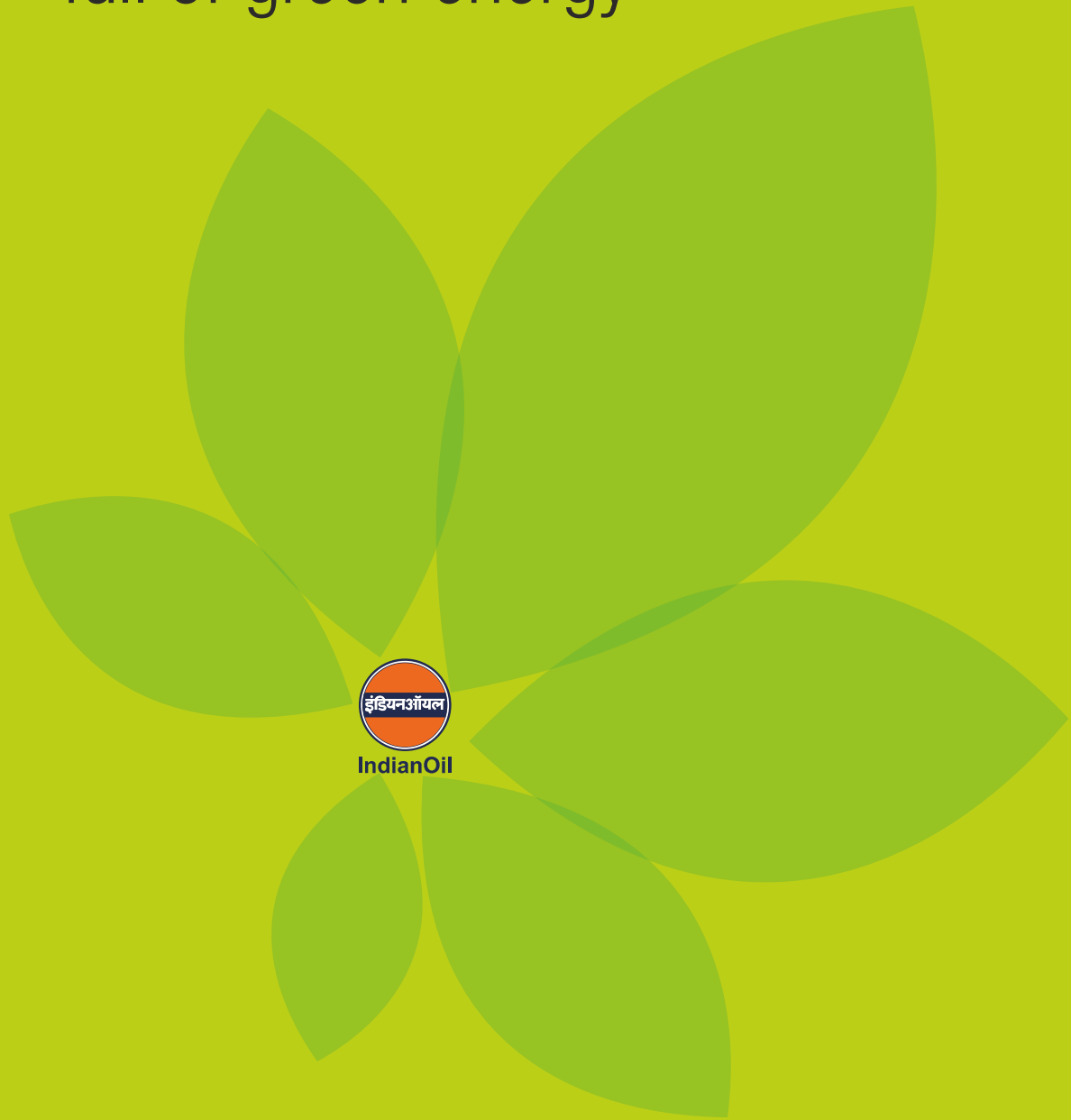


IndianOil

*IndianOil*  
*The Energy Of India*



**Fostering a future  
full of green energy**





## The Energy Vision

Welcome to the world of IndianOil, a diversified, integrated energy major with presence in almost all the streams of oil, gas, petrochemicals and alternative energy sources; a world of high-calibre people, state-of-the-art technologies and cutting-edge R&D; a world of best practices, quality-consciousness and transparency; and a world where energy in all its forms is tapped most responsibly and delivered to the consumers most affordably.

Welcome to IndianOil, *The Energy of India*.

## The Energy for India's Rise



Being *The Energy of India* is much more than just notching up high turnover (₹ 6,05,924 crore or US\$ 87 billion in 2018-19). It's far more than being ranked 117<sup>th</sup> among the world's largest corporates in Fortune's 'Global 500' listing, and the vision to become 'a globally admired company.'

Being *The Energy of India* is about IndianOil, with its over 33,500-strong team, taking the lead in meeting India's energy demands efficiently and effectively today, just as it has done over the last six decades, and an enterprise that fuels India's core sector for economic development.

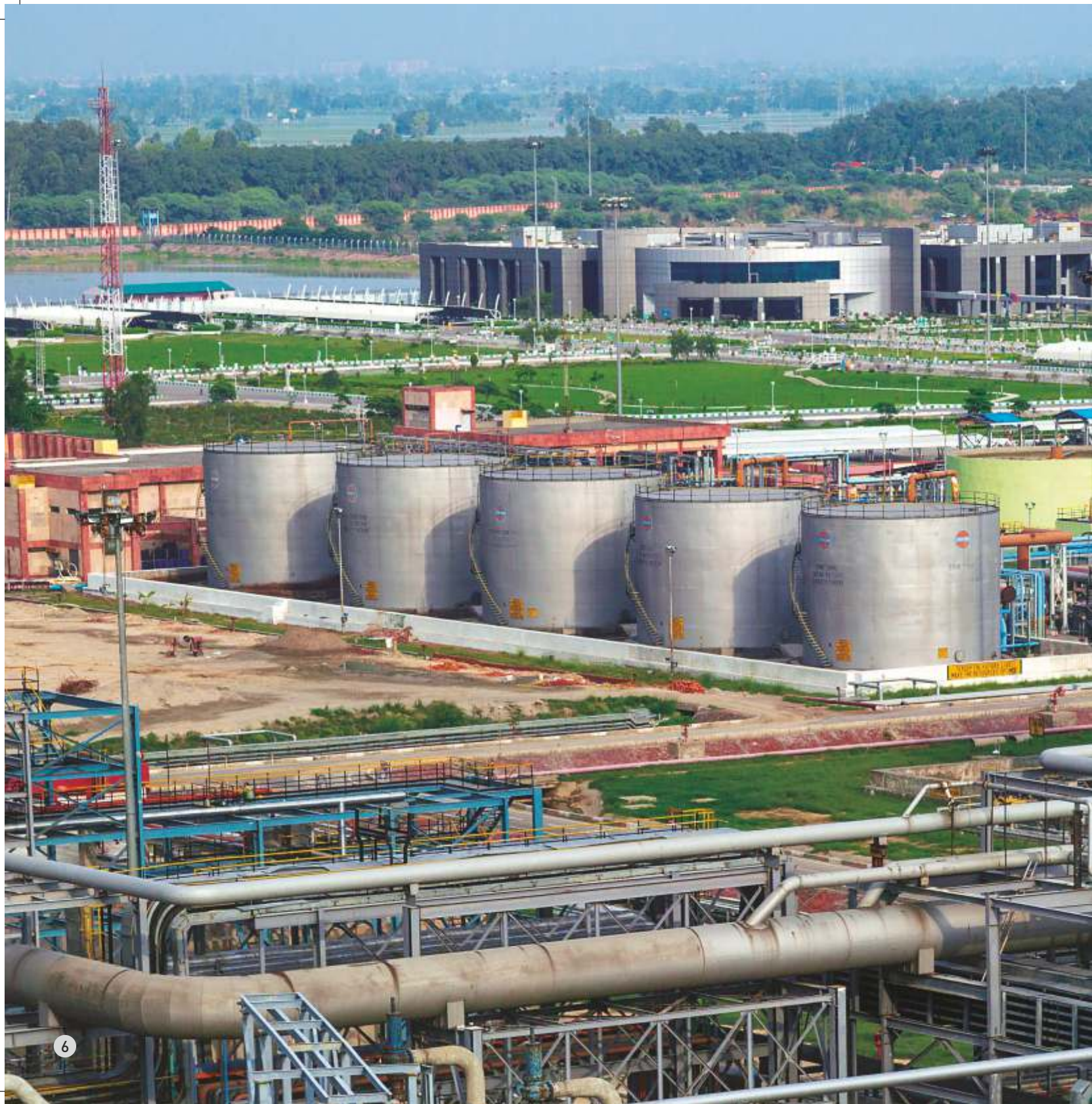
Being *The Energy of India* is about IndianOil's business interests encompassing the entire hydrocarbon value chain – from refining, pipeline transportation & marketing, to exploration & production of crude oil & gas, petrochemicals, gas marketing, alternative energy sources and globalisation of downstream operations.

Being *The Energy of India* is also about IndianOil's global aspirations, fulfilled to an extent by the formation of subsidiaries in Sri Lanka, Mauritius, the UAE, Singapore, Sweden, USA and The Netherlands. It is about pursuing diverse business interests with the setting up of over 20 joint ventures with reputed business partners from India and abroad to explore global opportunities.









As *The Energy of India*, IndianOil accounts for nearly half of India's petroleum products market share, with sales of about 90 million tonnes in 2018-19. Over 32% national refining capacity and 71% downstream sector pipelines throughput capacity are with IndianOil. What's more, the IndianOil Group owns and operates 11 of India's 23 refineries, with a combined refining capacity of 80.7 million metric tonnes per annum (MMTPA). IndianOil refineries are on the last leg of upgradations to produce world-class BS-VI compliant automotive fuels for supplies across the country from 1<sup>st</sup> April, 2020.

IndianOil's 14,200-km cross-country pipelines network facilitates the transportation of crude oil to refineries and finished products to high-demand centres in an efficient, economical and environment-friendly manner. Its throughput capacity of 94.20 MMTPA for crude oil and petroleum products and 21.69 MMSCMD for gas makes it one of the largest pipeline networks in the world.

## Taking the Lead to Fuel India's Energy Needs





## Energy at the Doorstep, Services at a Click



As the commercial enterprise with the largest customer interface in India, IndianOil reaches precious petroleum fuels to every nook and corner of the country through its network of over 50,000 customer touch-points, surmounting the challenges of tough terrain, climate and accessibility. This includes 27,700+ fuel stations (petrol pumps), including over 8,000 *Kisan Seva Kendra* (KSK) outlets in rural markets, all of them fully automated for quality & quantity assurance.

For the convenience of large-volume consumers like the defence services, railways, state transport undertakings, industrial, agricultural and marine sectors, IndianOil has about 7,000 dedicated fuel pumps in operation at their doorstep to ensure timely delivery of products and efficient maintenance of inventory.

For IndianOil, all customers, bulk or retail, are equal and have the right to quality products and efficient services. With this belief, the IndianOil team reaches Indane LPG cooking gas right up to the doorsteps of 14.8 crore households through a network of about 12,000 distributors. The Corporation is promoting LPG aggressively as a clean cooking fuel across socio-economic divides.

IndianOil's Aviation Service commands a 60% market share in aviation fuel, serving national and international flag carriers, private airlines and the Indian defence services with equal efficiency.

The countrywide marketing network is backed for supplies by 125 bulk storage terminals and depots and 91 LPG bottling plants, besides 116 aviation fuel stations and 13 lube blending plants.

As the 'company of choice' for millions of customers from diverse segments, IndianOil has also built up a portfolio of leading energy brands, including Indane LPG cooking gas, *SERVO* lubricants, XTRAPREMIUM petrol, XTRAMILE diesel, *PROPEL* petrochemicals, etc. Besides the corporate brand, both *SERVO* and Indane are over 50 year old brands and have earned the coveted Superbrand status.



# IndianOil Group Refineries and Pipelines Network

## Refineries

Installed Capacities

IndianOil Refineries	
Koyali	13.70
Paripat	15.00
Mathura	06.00
Baram	06.00
Haldia	07.50
Paradip	15.00
Bongasparan	02.35
Guwahati	01.00
Digboi	00.65
Subsidiaries' Refineries	
CPCL, Chennai	10.50
CPCL, Nainmanam	0.100
<b>Group Total</b>	<b>80.70</b>

(Figures in million metric tonnes per annum)

## LEGENDS

	Crude Oil Pipeline (Existing)
	Crude Oil Pipeline (Ongoing)
	Product Pipeline (Existing)
	Product Pipeline (Ongoing)
	R-LNG Pipeline (Existing)
	R-LNG Pipeline (Ongoing)
	LPG Pipeline (Existing)
	LPG Pipeline (Ongoing)
	Projects Under Consideration
	Single Point Mooring
	Potential Location for PL ToP
	IndianOil Refineries
	GAS Terminal





IndianOil

## Global Footprints of IndianOil



▲ INDIAN SUBSIDIARY

▲ OVERSEAS SUBSIDIARIES

E&P ASSETS :

★ PRODUCING ASSETS : 7

★ DEVELOPMENT ASSETS : 1

★ EXPLORATION ASSETS : 4

■ SERVO EXPORTS

● POLYMERS EXPORTS

★ DEG/TEG

+ LAB

● BENZENE

(Map not to scale)

## Advanced R&D, to be Future-Ready



IndianOil's sprawling R&D Centre at Faridabad, one of Asia's finest in downstream petroleum R&D, offers competitive advantage to the Corporation through world-class technology and process solutions and innovative products. With four decades of pioneering work in lubricants formulation, refinery processes and pipeline transportation, the Centre has garnered about 800 patents, of which nearly 550 are international patents.

The vibrant research undertaken in tribology is showcased by IndianOil's *SERVO* productline comprising more than 4,000 lubricant & grease formulations and 850 active grades to suit virtually every application. In addition, the Centre has also developed several refinery process technologies and catalysts specially suited to Indian conditions. The Centre's forte also includes alternative energy programmes in bio-energy, solar energy, Hydrogen energy, H-CNG blends, synthetic fuels and shale oil. It is also focussing on cutting-edge research in nanotechnology, petrochemicals & polymers, coal gasification/liquefaction, and gas-to-liquid technologies. The Centre is also nurturing an eco-system conducive for innovations in the domestic hydrocarbons sector through a Startup Fund.



“नवोदय”

*Petrochem & Nanotech  
Research Lab.*



## Synergy Beyond Energy



Over the past decade, IndianOil has assiduously built its new businesses, that is, petrochemicals and natural gas marketing, to a level where they have achieved integration with the core verticals. The Corporation's upstream forays into exploration & production have also yielded significant results in the form of a sizeable portfolio of oil & gas assets in India and abroad.

Besides being the second largest player in the domestic petrochemicals market, with 3.15 MMTPA capacity, IndianOil exports to over 70 countries, offering the complete slate of petrochemical products and intermediates under the brand name *PROPEL*. The Corporation has set up world-scale petrochemical plants at Gujarat, Panipat and Paradip refineries over the last two decades with a capex of over ₹ 25,000 crore, and has firm plans to invest ₹ 26,000 crore more till the year 2023-24 to consolidate business, expand capacities and enter niche grades. These projects include revamp/augmentation of existing capacities and new projects, forward integration plans into plastics and textiles parks as well as equity investment in *Hindustan Urvarak & Rasayan Ltd.* (HURL) for production of fertilizer.

As the second largest player in India in natural gas, IndianOil is aggressively promoting this eco-friendly fuel among all user segments: industry-transport-homes-commercial establishments. The Corporation aspires for leadership in the R-LNG segment, and is investing/enhancing share in LNG sourcing, import terminals, cross-country gas pipelines, city gas distribution (CGD) networks and bulk supplies by road-tankers. With an ambitious agenda of covering 40 Geographical Areas (GA) on its own as well as with reputed joint venture partners, IndianOil's investment on development of CGD networks, to offer piped natural gas (PNG) to households and compressed natural gas (CNG) as auto-fuel, in the next eight years is likely to be about ₹ 10,000 crore.

Upstream integration into E&P defines IndianOil's vision to bolster its energy security by way of strategic investments in oil equity across the globe. The Corporation's current upstream portfolio by way of Participating Interest comprises 10 domestic E&P assets and 12 overseas assets in 10 countries. With an upstream integration ratio of 5.5% and a balanced portfolio of producing, discovered and exploration assets, the Corporation has achieved significant progress in terms of 2P reserves, production volumes, equity oil and revenues.

IndianOil has planned for ₹ 2 lakh crore (US\$ 29 billion) investments in the next 5-7 years: Besides focus on refinery expansions, new technologies for clean fuels & enhanced outputs, and refinery-petrochemicals integration, IndianOil is aggressively leveraging its R&D expertise to move into horizon technologies like 2G & 3G ethanol, bio-fuels, coal gasification, H-CNG, Hydrogen fuel cells, battery technologies, etc. These technologies, along with cleaner fuels and higher engine efficiencies, can offer sustainable solutions to today's energy challenges.











## Fuelling India's Green Energy Quest



IndianOil is fully aligned to India's aspirations to transit to clean energy and has planned large investments in alternative energy and sustainable development projects. Besides a target to raise the Company's solar energy and wind-power portfolio from the current 222 MW to 260 MW by the year 2020, diversification into alternative, renewable energy options will cover production of ethanol from refinery off-gases, a novel bio-methanation process for converting organic waste to biogas, and commercialisation of a patented, economical process and enzyme for production of 2G ethanol from agricultural waste.

A green initiative of enormous potential is SATAT (Sustainable Alternative Towards Affordable Transportation), whereby Compressed Bio-Gas (CBG) produced from organic waste or biomass like farm residue, cattle dung, sugarcane press mud, etc., by entrepreneurs will be marketed for use in automotive, industrial and commercial sectors in local markets.

IndianOil has a strategic intent to scale up its presence in e-mobility by equipping its customer touch-points with turbo-charging and battery-swapping facilities for EVs and plug-in hybrids. IndianOil R&D is foraying into energy storage and batteries as a new and profitable business avenue. It has also undertaken trials of Hydrogen-spiked CNG, or H-CNG, derived from on-site compact reformers in bus fleets to reduce tailpipe emissions while at the same time enhancing mileage. The Centre is also working on Hydrogen fuel cells for transport applications, where Hydrogen is produced through the renewable route.



IndianOil is fully aligned to India's aspirations to transit to clean energy and has planned large investments in alternative energy and sustainable development projects. Besides a target to raise the Company's solar energy and wind-power portfolio from the current 222 MW to 260 MW by the year 2020, diversification into alternative, renewable energy options will cover production of ethanol from refinery off-gases, a novel bi-methanation process for converting organic waste to biogas, and commercialisation of a patented, economical process and enzyme for production of 2G ethanol from agricultural waste.

A green initiative of enormous potential is SATAT (Sustainable Alternative Towards Affordable Transportation), whereby Compressed Bio-Gas (CBG) produced from organic waste or biomass like farm residue, cattle dung, sugarcane press mud, etc., by entrepreneurs will be marketed for use in automotive, industrial and commercial sectors in local markets.

IndianOil has a strategic intent to scale up its presence in e-mobility by equipping its customer touch-points with turbo-charging and battery-swapping facilities for EVs and plug-in hybrids. IndianOil R&D is foraying into energy storage and batteries as a new and profitable business avenue. It has also undertaken trials of Hydrogen-spiked CNG, or H-CNG, derived from on-site compact reformers in bus fleets to reduce tailpipe emissions while at the same time enhancing mileage. The Centre is also working on Hydrogen fuel cells for transport applications, where Hydrogen is produced through the renewable route.

## Sustaining Responsible Growth







**IndianOil**

Corporate Office, 3079/3, Josip Broz Tito Marg, Sadiq Nagar, New Delhi - 110049  
[www.iocl.com](http://www.iocl.com)

