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A Maharatna
Company

SOUTH EASTERN REGION PIPELINES

Fuelling Growth With Care, Innovation and Technology

Paradip Hyderabad Pipeline Project Advantage Telangana State

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Indian Oil Overview



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The Energy of India



Indian Oil Corporation Ltd.

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Strong Support from the Government of India

- Maharatna Company; GoI Control: 57.34%
- Government nominated Directors on IOC Board
- Contribution to exchequer of INR 1,79,014 Cr in FY17



Largest Refiner in the Country

- 11 refineries with 80.7 MMTPA Capacity
- 35% of Domestic Refining Capacity



Pan-India Pipeline Infrastructure

- 13391 km pipelines for crude oil and products with a total capacity of 94.79 MMTPA
- 48% share in crude and product pipeline (by length)



Leading Market Share Across Portfolio

- 45.1% petroleum market share in FY17 with over 46,500 touch points



Integrated Operations Across the entire Energy Value Chain

- 2nd largest domestic player in Petrochemicals
- E&P: 8 domestic and 9 overseas blocks



Strong Focus on Innovation Through R&D and Alternate Energy Sources

- Overall 554 patents as on 31.03.2017
- New focus on Alternate and Renewable Energy (Wind, Solar, Biofuels, Nuclear)



Driven by a Management Team That has Delivered Results

- Consistent growth and profitability
 - FY11-FY17 Revenue CAGR: 6.59%
 - Debt / Equity of 0.55x (as on Mar 31, 2017)

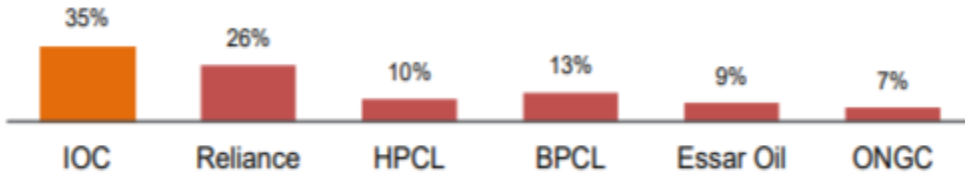




IOCL's Dominance in Downstream Oil Sector

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Leader in Refining Market Share⁽¹⁾

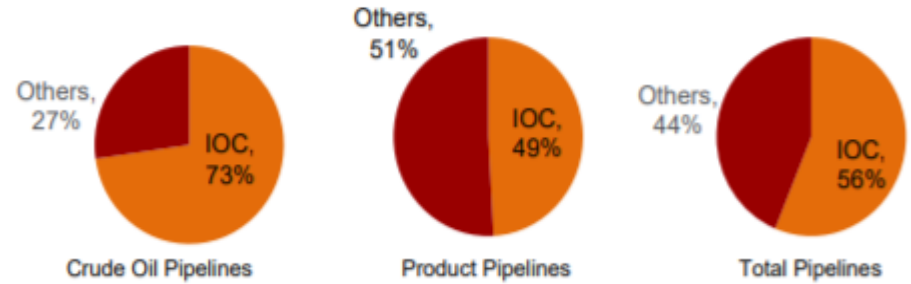


Note: Figures as of March 31, 2017.

(1) Market share based on group Refining Capacity

Source: PPAC website

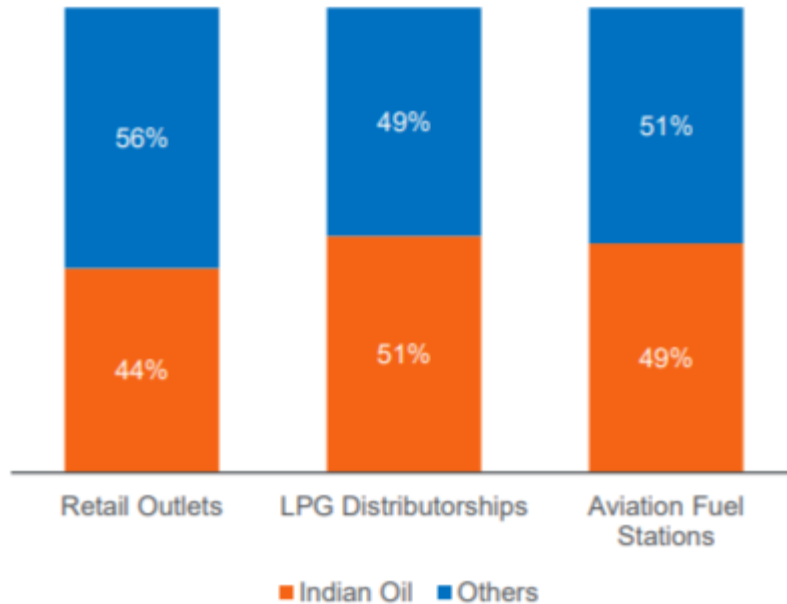
Largest Pipeline Market Share - Downstream



Source: PPAC Website

Note: Figures as of March 31, 2017

Leader in Market Infrastructure



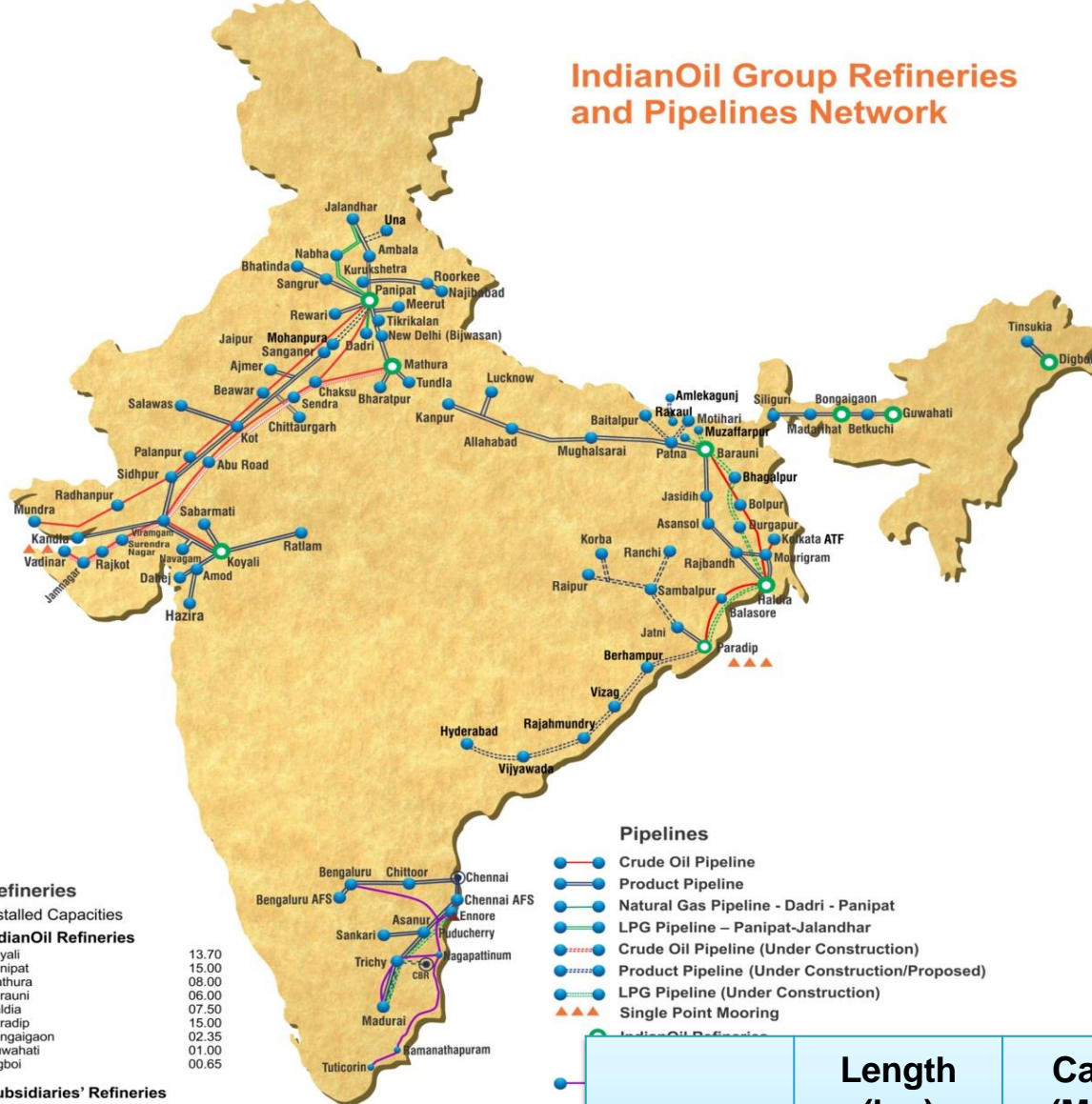
Source: Company Filing & PPAC Website

Indian Oil Corporation also has strong presences in

- R&D Prowess in all spheres of petroleum oil and NG
- Petrochemicals,
- LNG import facility and CGD network
- Domestic Overseas Operatorship
- Wind, Solar Biofuels Sustainability
- Nuclear JV with NPCIL
- Exports, Consultancy, Training, Downstream Marketing
- Several JVs doing flourishing business overseas



IndianOil Group Refineries and Pipelines Network



Refineries

Installed Capacities

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Koyali	13.70
Panipat	15.00
Mathura	08.00
Barauni	06.00
Haldia	07.50
Paradip	15.00
Bongaigaon	02.35
Guwahati	01.00
Digboi	00.65

Subsidiaries' Refineries

CPCL, Chennai	10.50
CPCL, Narimanam	01.00

Group Total **80.70**

(Figures in million metric tonnes per annum)

- Pipelines**
- Crude Oil Pipeline
 - Product Pipeline
 - Natural Gas Pipeline - Dadri - Panipat
 - LPG Pipeline – Panipat-Jalandhar
 - Crude Oil Pipeline (Under Construction)
 - Product Pipeline (Under Construction/Proposed)
 - LPG Pipeline (Under Construction)
 - ▲ Single Point Mooring

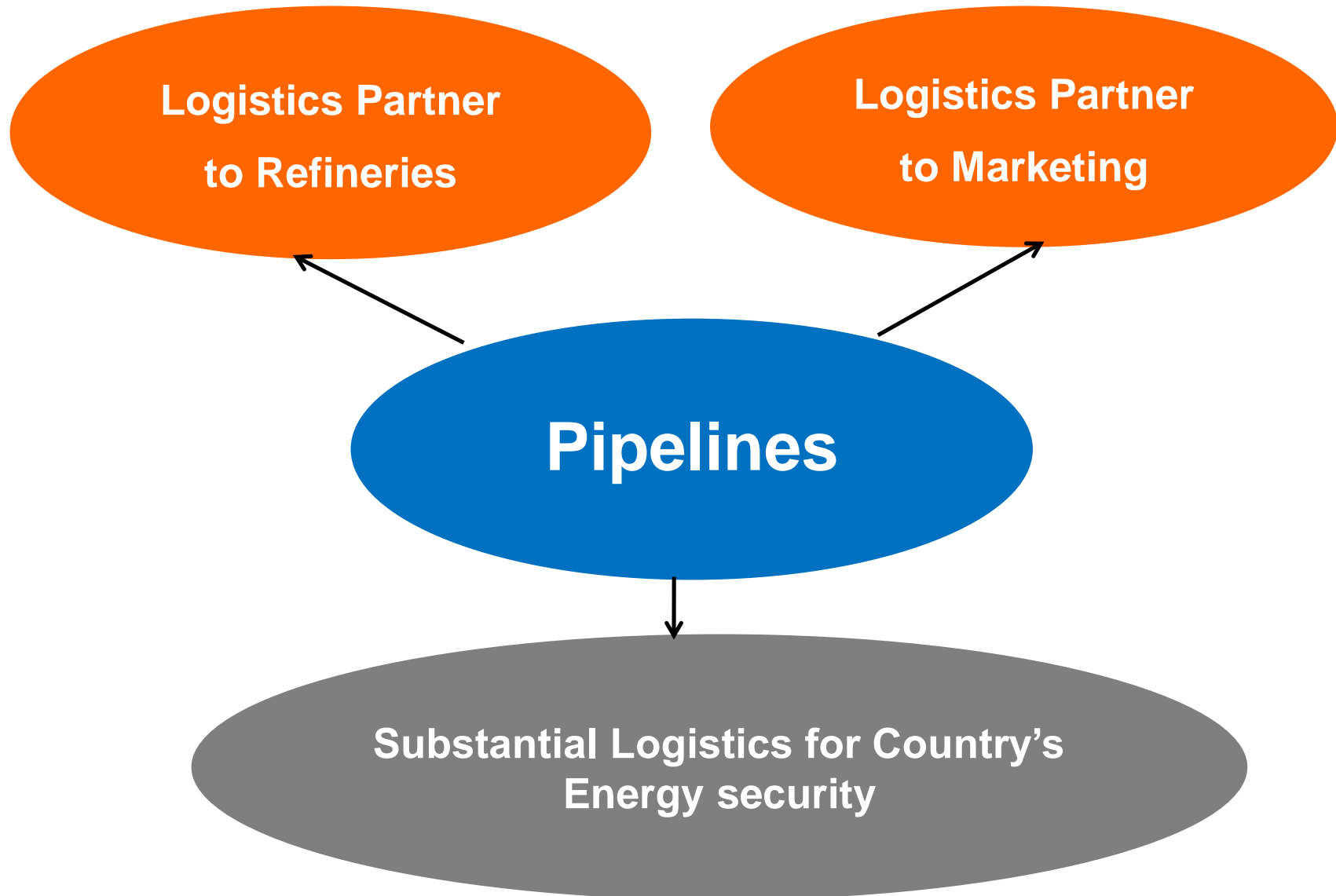
	Length (km)	Capacity (MMTPA)
Product	7950	46.19
Crude Oil	5301	48.6
Total	13251	94.79
Gas	140	9.5 MMSCMD
G Total	13391	

(Map not to scale)



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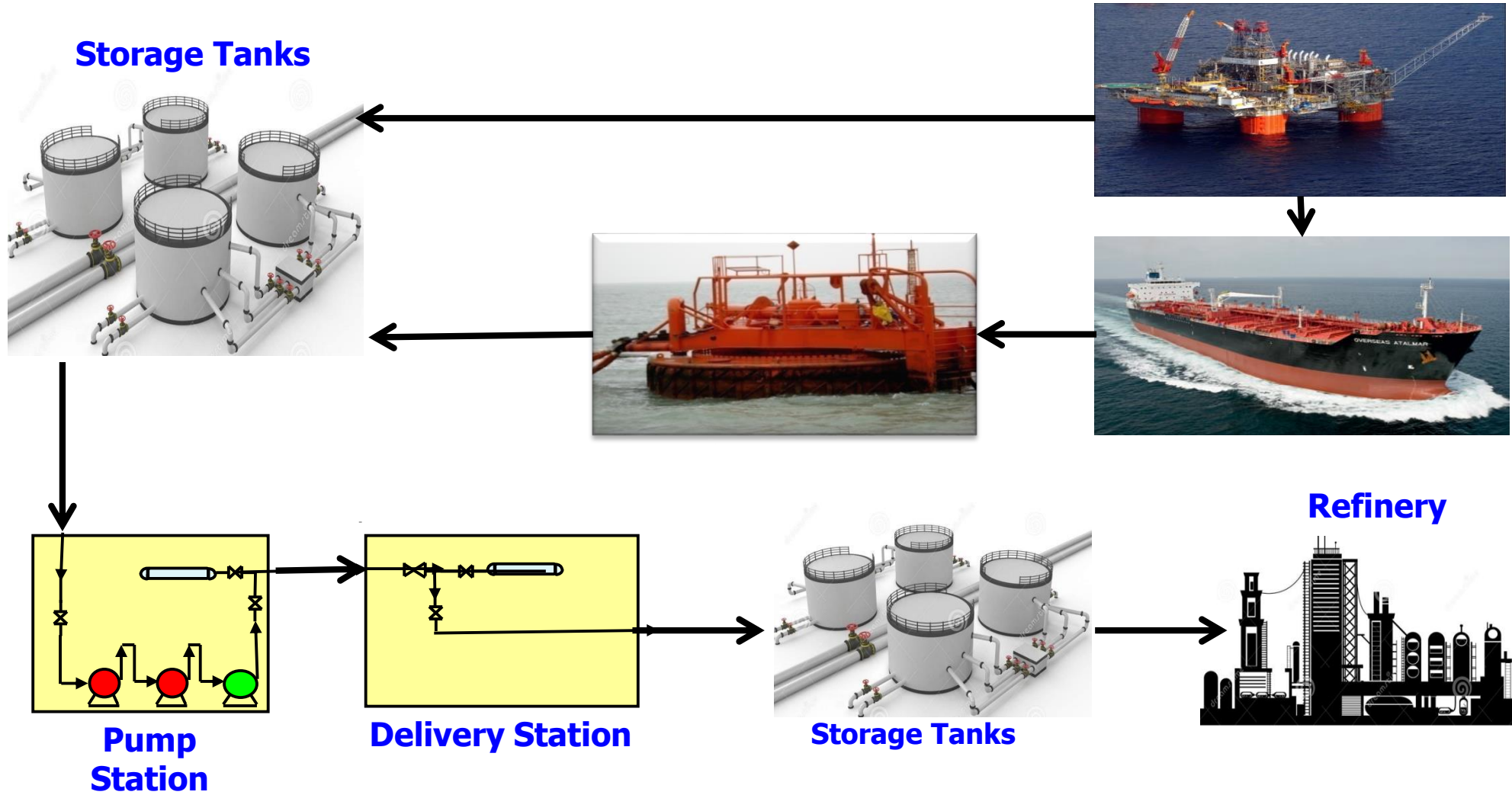
Pipelines - The Critical Link





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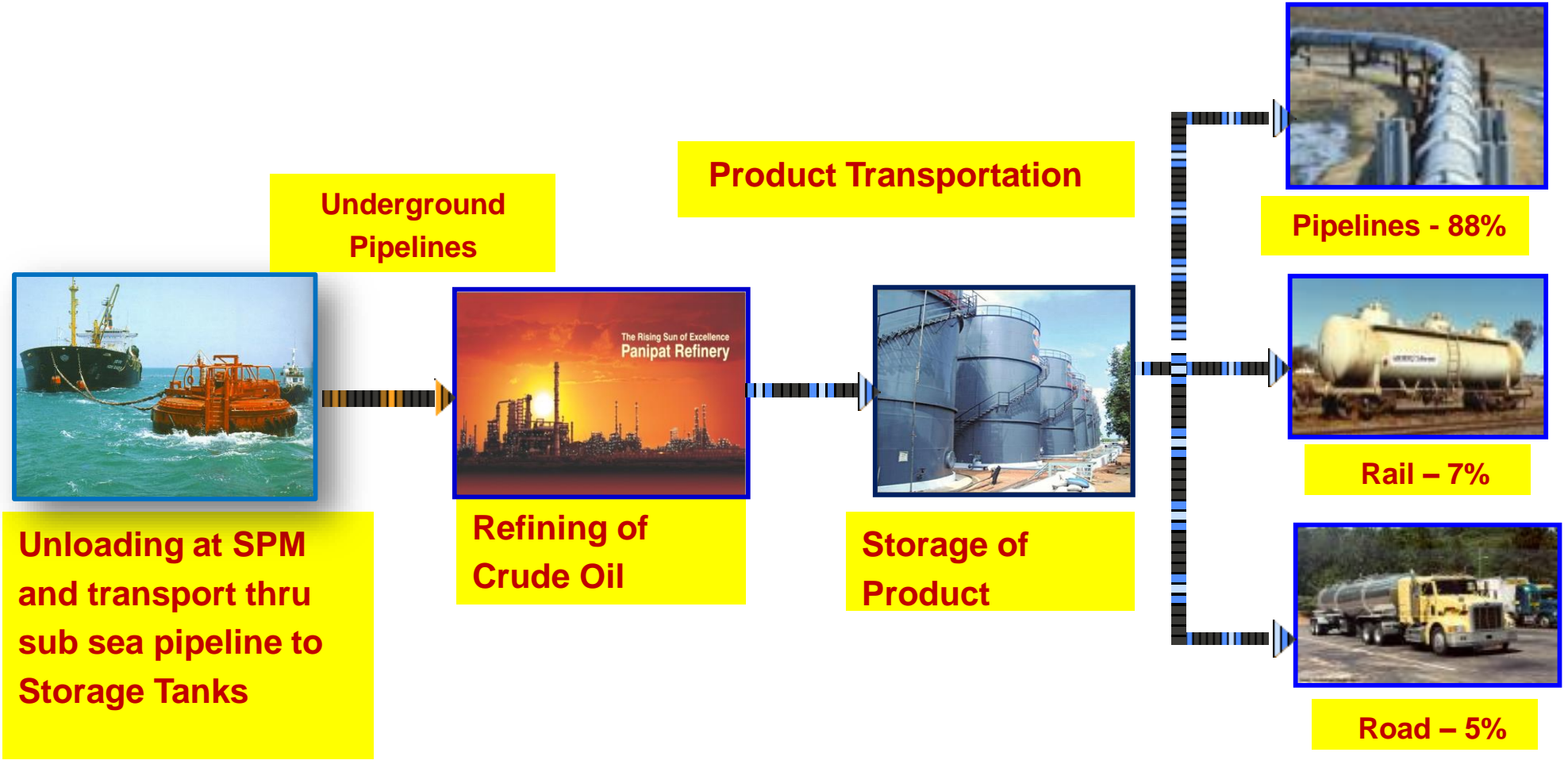
Typical Supply Chain : Crude Oil



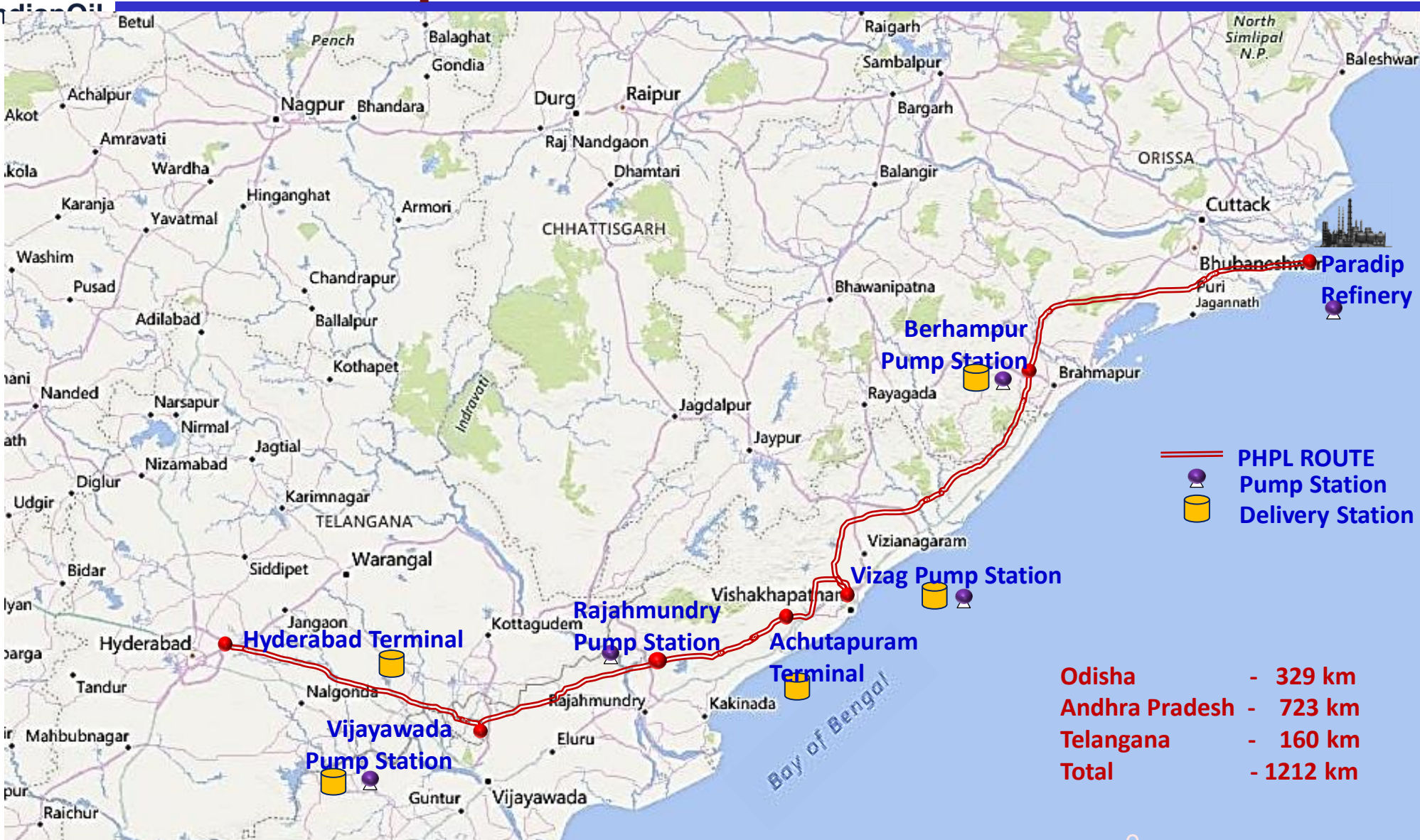


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Supply Chain-Product



Paradip-Hyderabad Pipeline Project - Route Map



PHPL ROUTE
 Pump Station
 Delivery Station

Odisha	- 329 km
Andhra Pradesh	- 723 km
Telangana	- 160 km
Total	- 1212 km



Paradip-Hyderabad Pipeline Project - Overall Map





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Paradip-Hyderabad Pipeline Project - The Background



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- Evacuation of petroleum products from newly constructed 15 Million Tone capacity state of the art Paradip Refinery.
- Non-viability of transportation of products through sea route from Paradip to Visakhapatnam port.
- PHPL will also ensure delivery of products at Berhampur (South Odisha)
- Rise in demand of petroleum products in Andhra Pradesh & Telangana states. The industry sale of products is expected to 14 MMTPA in 2021-22 as compared to 8.5 MMTPA in 2012-13.
- Capacity constraints of existing VVSPL (Visakhapatnam- Vijayawada- Secunderabad Pipeline) of HPCL and eliminating the dependence of IOCL on HPCL, VVSPL.
- Inadequacy of Vizag Jetty facilities. In order to meet the full requirement of products, a complete major revamping of port is required. Jetty is under VPT. Jetty is being utilized by other oil companies also.
- Demand of Vizag, Rajahmundry, Vijayawada and Hyderabad is expected to reach 4 MMTPA.
- The availability of surplus products at Paradip Refinery even after meeting the demand of PRRPL and others which can be pumped to PHPL



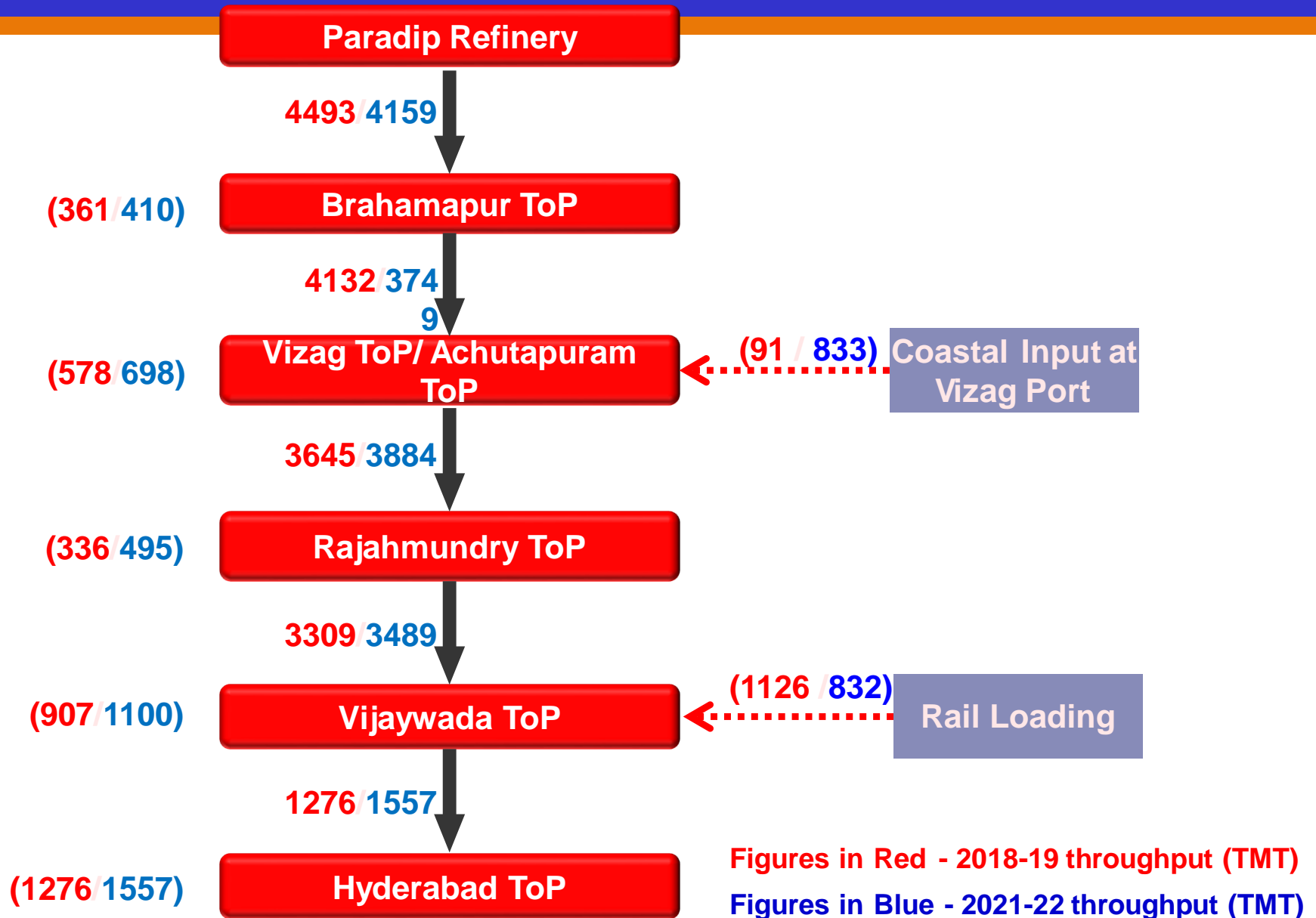
Paradip-Hyderabad Pipeline Project - Salient Features



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Capital Cost of Project	Rs. 2789 Cr. (Under Revision)
Date of approval	29.01.2015
Approved completion date	August 2020
Length of Pipeline & size	1212 Km, API 5L-X70 Grade 18"-314Km, 16"-669Km, 14"-229Km
States Covered	Odisha, Andhra Pradesh and Telangana
Pumping Stations	Paradip, Berhampur, Visakhapatnam, Rajahmundry and Vijayawada
Delivery Stations	Berhampur, Visakhapatnam, Atchutapuram, Vijayawada & Hyderabad

Paradip-Hyderabad Pipeline Project – Supply & Distribution Scheme





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THANK
YOU