

GAIL (India) Limited

GAIL (India) Limited is India's leading natural gas company, with a robust and diversified presence across the entire natural gas value chain and beyond. Its operations encompass the transmission and marketing of Natural Gas, production of Liquefied Petroleum Gas (LPG) and other liquid hydrocarbons, LPG transmission, Polymer production and marketing, City Gas Distribution, LNG sourcing, shipping and regasification, renewable energy initiatives and upstream exploration and production activities.

GAIL owns and operates an extensive network of approximately 18400+ km of natural gas pipelines, spanning the length and breadth of India. The company is actively engaged in the execution of multiple pipeline projects aimed at further expanding its nationwide coverage, commanding approximately 65% of the natural gas transmission market in India.

Natural Gas trading is GAIL's core business, and the company holds a significant ~47% share of the domestic natural gas market. GAIL supplies approximately two-thirds of the gas consumed by the fertilizer sector and around 45% of the gas used by gas-based power plants across India.

In Liquefied Petroleum Gas (LPG) and other Liquid Hydrocarbons (LHC) portfolio, GAIL has five Gas Processing Units (GPUs) at four locations in the country i.e. Vijaipur (2 Units), Pata, Gandhar & Vaghodia, to extract higher fractions from natural gas, having a total LPG & LHC production capacity of 1425 KTA.

GAIL owns and operates 2,040 km of LPG pipeline network for LPG transmission consisting mainly of 1,427 km Jamnagar-Loni Pipeline (JLPL) which connects the western and northern parts of India and 610 km Vizag-Secunderabad Pipeline (VSPL) which is in the southern part of the country connecting the Eastern Coast. GAIL is augmenting Jamnagar- Loni Pipeline capacity from 3.25 MMTPA to 6.5 MMTPA. GAIL is also executing Uran- Usar Propane Pipeline and Vijaipur- Pata C2/C3 pipeline.

GAIL is also a pioneer in using natural gas for producing petrochemicals, with a total polymer capacity of 810 KTA at its Pata complex. Its subsidiary, Brahmaputra Cracker & Polymer Limited (BCPL), adds another 280 KTA. GAIL has also installed production capacity of 60 KTA Polypropylene products at Pata and will soon be producing 500 KTA at Usar under the brand name 'G-Pro' and will soon diversify its product range in Polyester value chain through production of Pure Terephthalic Acid (PTA) which is branded as 'G-Tex' at its wholly owned subsidiary, GAIL Mangalore Petrochemicals Limited (GMPL).

In the Liquefied Natural Gas (LNG) market, GAIL has significantly large portfolio of around 16.57 MMTPA from USA, Qatar, Australia etc., GAIL has emerged as one of the leading global LNG players and is actively involved in the LNG trading business in the

international market. GAIL strengthens its LNG sourcing portfolio by securing several long-term deals, importing LNG cargoes to meet its demand, and expanding LNG infrastructure from import terminals to transportation and city gas distribution network. GAIL has also expanded its LNG shipping capacity by bringing 7 LNG vessels namely: GAIL Bhuwan, GAIL Sagar, GAIL Urja, Grace Emilia, Maran Gas Pericles & Maran Gas Ulysses, and through number of spots. Company also operates LNG Terminal at Dabhol through its subsidiary Konkan LNG Limited. The terminal is designated an all-weather port. GAIL has participating interest in 10 E&P blocks of which 8 are in India, 2 blocks in Myanmar) and additionally in 1 Shale Gas acreage in Eagle Ford Basin, Texas, USA through wholly owned subsidiary – GAIL Global (USA) Inc

GAIL is a pioneer in City Gas Distribution business in India with 8 JVs and 3 subsidiaries in India for its CGD business. GAIL group companies are authorized in 72 GAs, spread over 21 States/UTs, catering to ~10.7 million PNG customers and 3250+ CNG stations across the country.

GAIL has a strong international presence through its overseas business operations. In the USA, GAIL operates through GAIL Global (USA) Inc., GAIL Global (USA) LNG LLC and Eagle Ford Shale Acreage. In Singapore, its presence is established through GAIL Global (Singapore) Pte. Limited. GAIL also has strategic participation in China Gas Holding Limited in China and operates in Russia through LLC Bharat Energy Office. In Egypt, GAIL is associated with Fayum Gas and Natgas, while in Myanmar, it is involved in the A1 and A3 E&P Blocks through SEAGP Co. Ltd. Additionally, GAIL has a presence in Cyprus through LNG Japonica Shipping Corporation Limited.

In the Renewable Segment, GAIL focuses on developing captive RE Power projects and enhancing in-house competencies to meet its internal consumption targets. GAIL has a total installed capacity of 154 MW of Renewable Energy, out of which ~118 MW is from wind energy and ~36 MW is from solar energy. As part of its foray into alternate energy and aligned with the National Green Hydrogen Mission, GAIL has commissioned its first Green Hydrogen Plant at Vijaipur, Madhya Pradesh, with a 10 MW PEM electrolyser producing 4.3 TPD of high-purity hydrogen using renewable power.

GAIL is advancing the CBG-CGD Synchronisation scheme to supply biogas to the City Gas Distribution (CGD) sector across India. The company has initiated biogas supplies in 116 geographical areas and commissioned its first Compressed Biogas (CBG) plant with a 5 TPD production capacity at Ranchi.

GAIL has set an ambitious Net Zero target, aiming to achieve 100% reduction in Scope 1 and Scope 2 by 2035, and 35% reduction in Scope 3 emission by 2040. The company has developed a robust roadmap for execution, focusing on multiple decarbonization strategies. These include electrification of natural gas-based equipment, integration of renewable energy, deployment of compressed biogas (CBG), green hydrogen initiatives, CO₂ vaporization, energy efficiency improvements, and carbon offsetting through afforestation and first-generation ethanol.