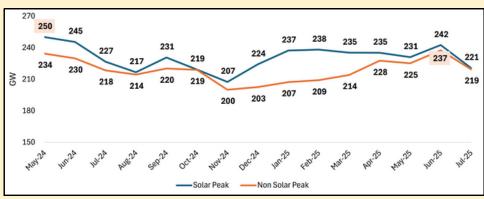


MONTHLY SNAPSHOT

INDIA POWER SECTOR: JULY 2025

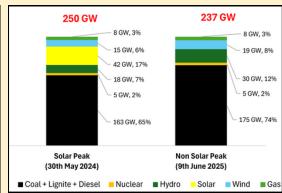
Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (221 GW) on 21st July 2025 @10:55 hrs 2) Non Solar Peak (219 GW) on 28th July 2025 @ 19:52 hrs

Source: Grid India

Figure 2: Source-wise contribution in Peak Demand [EFFECTIVE CAPACITIES]



Note: Contribution mix at the maximum peak recorded in last 15 months with Solar Peak recorded on 30th May 2024 at 14:57 hours and Non-Solar Peak recorded on 9th June 2025 at 22:46 hours; Source: Grid India

Table 1: INSTALLED CAPACITY (GW)

Source		2030 Target	Under Planning	Under Construction	Jul-25	Y-o-Y Growth
Fossil Sources		277	51	33	244	0%
Thermal	Coal & Lignite	252	51*	33	223	3%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		482	92	124	246	20%
Nuclear		15	7	7	9	7%
Hydro	Large	54	21	13	50	6%
	Small	5			5	1%
Solar	Ground Mounted Solar	293	46	74	91	35%
	Solar Rooftop				20	48%
	Hybrid Solar				3	18%
	Off-grid Solar/KUSUM				5	38%
Wind		100	18	30	52	11%
Other		15			12	6%
Total		759	143	158	490	-25%
Pumped Storage Plants		19	3	12	6	36%
Battery Energy Storage System (GW/GWh)		41.65/ 208.25		15.83/ 51.11	-	-

Note: *Data extracted from Reply by MoP to Lok Sabha Unstarred Question No. 3163 dated 7/08/2025

Source: Central Electricity Authority; Ministry of New and Renewable Energy; Optimal Generation Mix Report; Parliament Q&A

Table 2: MONTHLY GENERATION (BU)

Source		Jul-25	Y-o-Y Growth	
Thermal		106	-5% 👢	
Nuclear		5	-5% 👃	
Hydro	Large	22	23% 👚	
riyaro	Small	1.2	-12% 👢	
Solar		12	13% 👚	
Wind		14	5% 👚	
Other (Biomass, Bagasse)		0.1	-91% 👢	
Total		160	-0.1%↓	

Note: Generation through Renewable Energy (RE) sources is prepared from Cumulative Daily generation reports of July 2025 since Monthly RE generation report has yet not been uploaded on CEA website. SHP generation has been provisionally kept as per June'25

Source: Central Electricity Authority; Ministry of New and Renewable Energy

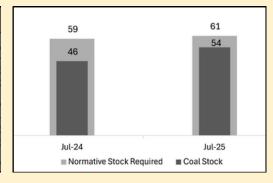
Table 3: TRANSMISSION INFRASTRUCTURE

Parameter	NEP Target (2032)	Under Planning^	Under Construction*	Jul-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	75	496	2%
ISTS	295	43	36	215	2%
InSTS	354	33	39	281	2%
Transformation capacity ('000 MVA)	2,412	530	512	1370	9%
ISTS	1,281	348	357	576	11%
InSTS	1,131	182	155	793	7%
Inter-regional Trans. Capacity (GW)	168			120	1%

Note: ^ Considering capacity to be added during FY 2027-32 as under planning stage; *Considering capacity to be added

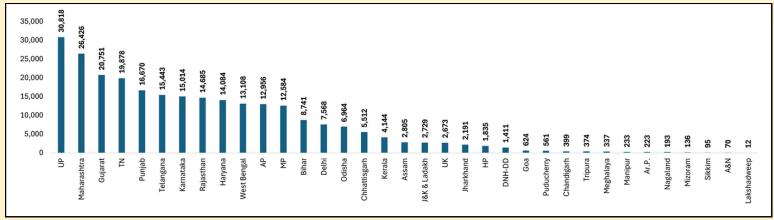
during FY 2022-27 as under construction stage Source: NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

Figure 4: STATE-WISE PEAK DEMAND (MW) IN JULY 2025



Source: Central Electricity Authority

KEY HIGHLIGHTS

- 1. State GENCO of Telanagana Yadadri TPS Unit 1 (800 MW) and Vedanta Ltd. Chhattisgarh TPP Unit-1 (600 MW) achieved CoD in July 2025.
- 2. National Stock Exchange (NSE) launched monthly electricity futures contracts for derivative. Further, CERC also ordered implementation of market coupling for Day Ahead Market (DAM) from January 2026.
- 3. Generation from NHPC Parbati II (800 MW) & Parbati III (520 MW) got affected due to cloudburst in Himachal Pradesh.

[All data was last accessed on 20th August 2025]



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