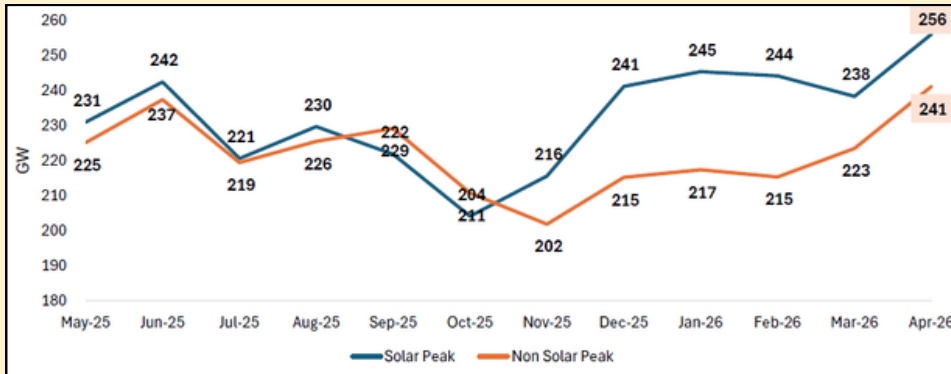


MONTHLY SNAPSHOT

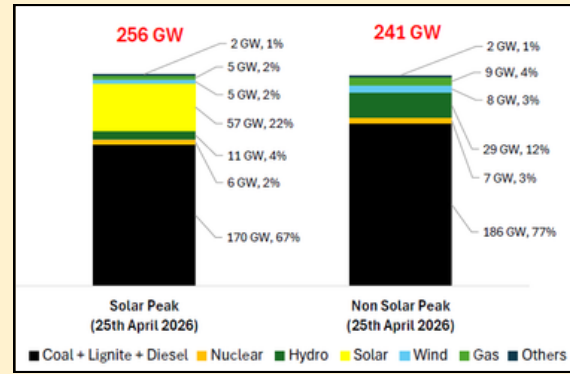
INDIA POWER SECTOR: APRIL 2026

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (256 GW) on 25th April 2026 @15:39 hrs
 2) Non Solar Peak (241 GW) on 25th April 2026 @22:39 hrs
Source: Grid India

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



Note: Contribution mix at the maximum peak recorded in last 12 months with Solar Peak recorded on 25th April 2026 at 15:38 hours and Non-Solar Peak recorded on 25th April 2026 at 22:39 hours;
Source: Grid India

Table 1: INSTALLED CAPACITY (GW)

Source	2030 Target	Under Planning*	Under Construction	Apr-26	Y-o-Y Growth
Fossil Sources	277	47	39	249	4%
Thermal					
Coal & Lignite	252	47	39	229	4%
Diesel & Gas	25			21	0%
Non-Fossil Sources	482	91	140	288	24%
Nuclear	15	7	7	9	0%
Hydro					
Large^	54	20	14	52	8%
Small	5			5	1%
Solar					
Ground Mounted Solar	293	35	90	117	42%
Solar Rooftop				27	51%
Hybrid Solar				4	37%
Off-grid Solar/KUSUM				6	24%
Wind	100	14	29	56	11%
Other	15	14		12	1%
Total	759	138	179	537	14%
Pumped Storage Plants	19	7	16	7	56%
Battery Energy Storage System (GW/GWh)	41.65/208.25	19.80/61.01	9.65/26.73	-	-

Note: *Data extracted from Reply by MoP to Lok Sabha Unstarred Question No. 4425 dated 19/03/2026;
 ^ Large Hydro includes Pumped Storage Plants.

Source: Central Electricity Authority; Ministry of New and Renewable Energy; Optimal Generation Mix Report; Parliament Q&A, Ministry of Power (Power Sector at a Glance "ALL INDIA")

Table 2: MONTHLY GENERATION (BU)

Source	Apr-26	Y-o-Y Growth
Thermal	121	1.6% ↑
Nuclear	5	4% ↑
Hydro		
Large	11	12% ↑
Small	0.6	-14% ↓
Solar	21	32% ↑
Wind	7	8% ↑
Other (Biomass, Bagasse)	1.0	2% ↑
Total	166	5.6% ↑

Source: Central Electricity Authority

Table 3: TRANSMISSION INFRASTRUCTURE

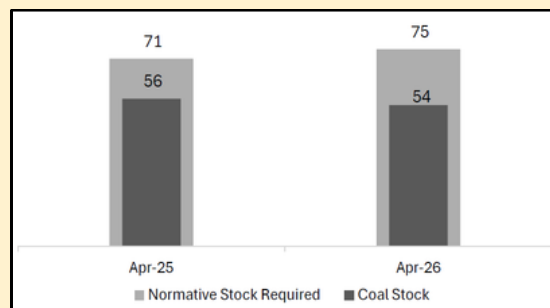
Parameter	NEP Target (2032)	Under Planning [^]	Under Construction [*]	Apr-26	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	64	507	3%
ISTS	295	43	30	221	3%
InSTS	354	33	34	287	2%
Transformation capacity ('000 MVA)	2,412	530	420	1462	8%
ISTS	1,281	348	295	638	13%
InSTS	1,131	182	125	824	5%
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

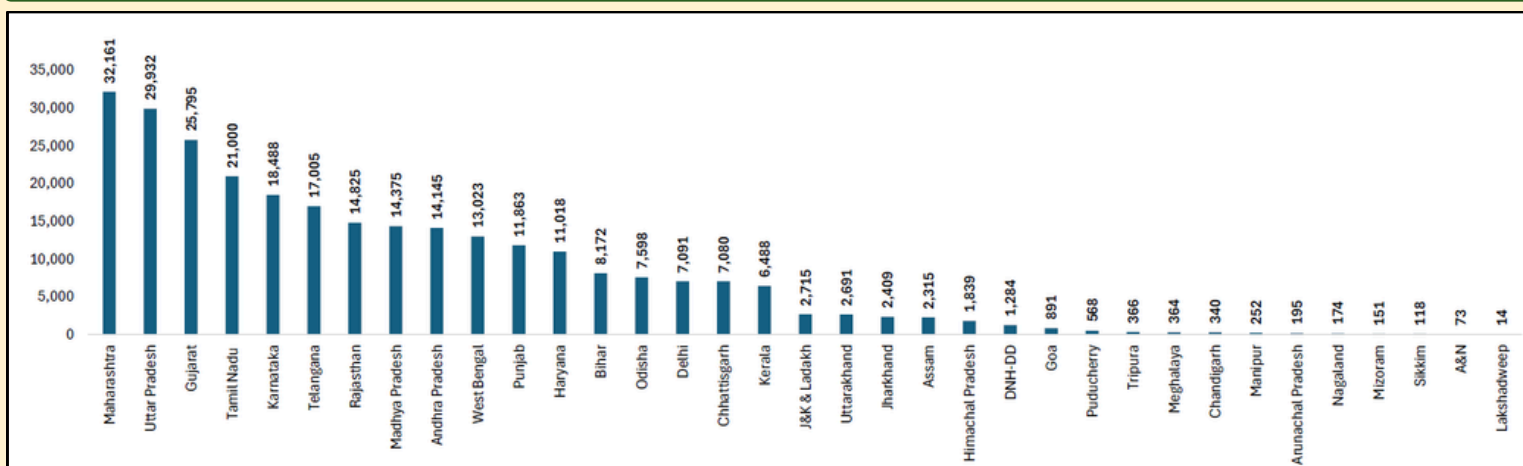
Source: NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

Figure 4: STATE-WISE PEAK DEMAND (MW) IN APRIL 2026



Source: Central Electricity Authority

KEY HIGHLIGHTS

- Unit-4 (250 MW Hydro Power Plant) of THDC Tehri PSP was added in the Indian Grid in the month of April 2026
- 19 SERCs have issued Tariff Orders for True-up of FY 2024-25 and ARR of FY 2026-27:
 - PSERC, HPERC & MERC have announced reduced Tariff for all consumer categories
 - BERC has announced reduction in tariff of Domestic & Non-Domestic consumer category only
 - Tariff hike of 4.80% is announced by MPERC, 6.12% by JSERC and by TERC
 - AERC, APERC, HERC, OERC, GERC, MZERC, MSERC, UERC, TGERC, RERC & APSERC have announced no change in Tariff
 - KERC issued True-up
- CERC issues Draft (Power Market) (Second Amendment) Regulations, 2026 proposing a formal framework for implementation of market coupling in India. Grid India is designated as Market Coupling Operator and directed to develop a detailed Power Market Coupling Procedure.
- Ministry of Power vide Office Memorandum dated 16/04/2026, extended the Inter-State Transmission charges waiver on transmission of electricity generated from solar and wind sources of energy for Renewable Energy projects delayed due to delay in readiness of transmission infrastructure

[All data was last accessed on 27th May 2026]



POWER FOUNDATION OF INDIA

PFI is a Policy Research and Advocacy entity registered as a society under the aegis of Ministry of Power (MoP), Government of India. It is supported by leading Central Power Sector Organizations to undertake evidence-based policy research and facilitate informed decision making by the MoP, Central & State Electricity Regulatory Commissions and other concerned stakeholders.

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