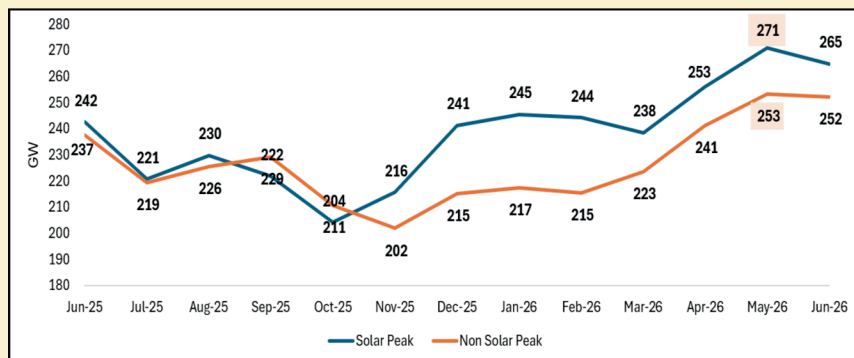


MONTHLY SNAPSHOT

INDIA POWER SECTOR: JUNE 2026

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (265 GW) on 27th June 2026 @14:50 hrs
2) Non Solar Peak (252 GW) on 10th June 2026 @22:32 hrs

Source: Grid India

Table 1: INSTALLED CAPACITY (GW)

Source		2030 Target	Jun-26	Under Construction	Under Planning*
Fossil Sources		277	251	39	47
Thermal	Coal & Lignite	252	231	39	47
	Diesel & Gas	25	21		
Non-Fossil Sources		482	297	139	89
Nuclear		15	9	7	7
Hydro	Large^	54	52	13	20
	Small	5	5		
Solar	Ground Mounted Solar	293	121	90	35
	Solar Rooftop		30		
	Hybrid Solar		4		
	Off-grid Solar/KUSUM		6		
Wind		100	57	29	13
Other		15	12		13
Total		759	549	179	136
Pumped Storage Plants		19	7	16	7
Battery Energy Storage System (GW/GWh)		41.65/208.25	2.72/7.50	26.44/94.78	15.26/41.54

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

Under Planning and Under Construction Data is as available on 17/07/26

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 3: TRANSMISSION INFRASTRUCTURE

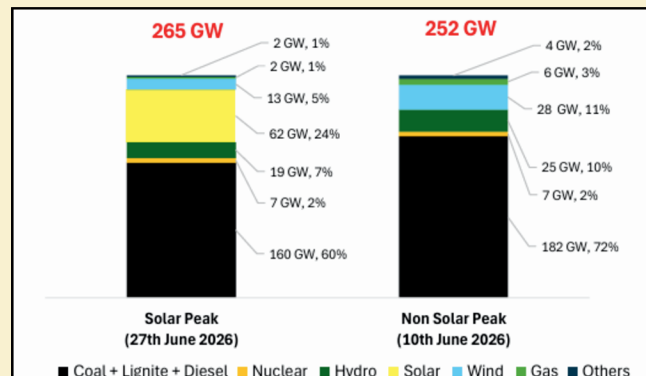
Parameter	NEP Target (2032)	May-26	Under Planning^	Under Construction*
Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	509	77	63
ISTS	295	221	43	30
InSTS	354	287	33	33
Transformation capacity ('000 MVA)	2,412	1469	530	413
ISTS	1,281	640	348	293
InSTS	1,131	829	182	120
Inter-regional Trans. Capacity (GW)	168	120		

^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

Note: Latest available data as on 17/07/26

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

FIGURE 2: SOURCE-WISE CONTRIBUTION IN PEAK DEMAND [EFFECTIVE CAPACITIES]



Note: Contribution mix at the maximum peak in June 2026 with Solar Peak (265 GW) on 27th June 2026 @14:50 hrs and Non Solar Peak (252 GW) on 10th June 2026 @22:32 hrs

Source: Grid India

Table 2: MONTHLY GENERATION (BU)

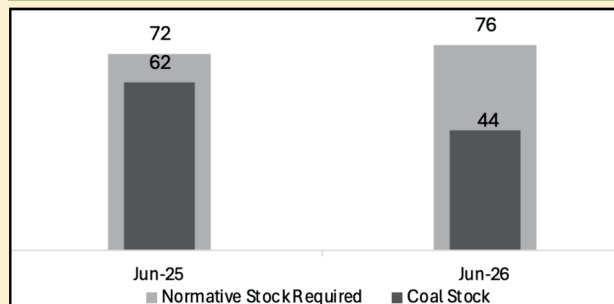
Source		Jun-26	Y-o-Y Growth
Thermal		122	12.5% ↑
Nuclear		6	23% ↑
Hydro	Large	13	-20% ↓
	Small	0.5	-55% ↓
Solar		19	44% ↑
Wind		14	-5% ↓
Other (Biomass, Bagasse)		0.3	-55% ↓
Total		175	9.5% ↑

Note: 1) Generation through Renewable Energy sources is prepared from Cumulative Daily generation reports of June 2026 which does not capture SHP separately. Hence, SHP generation has been provisionally kept in the same ratio as of 'SHP: Others' as per June 2025.

2) Monthly Generation for Thermal, Hydro and Nuclear taken from NPP Monthly Report (TENTATIVE)

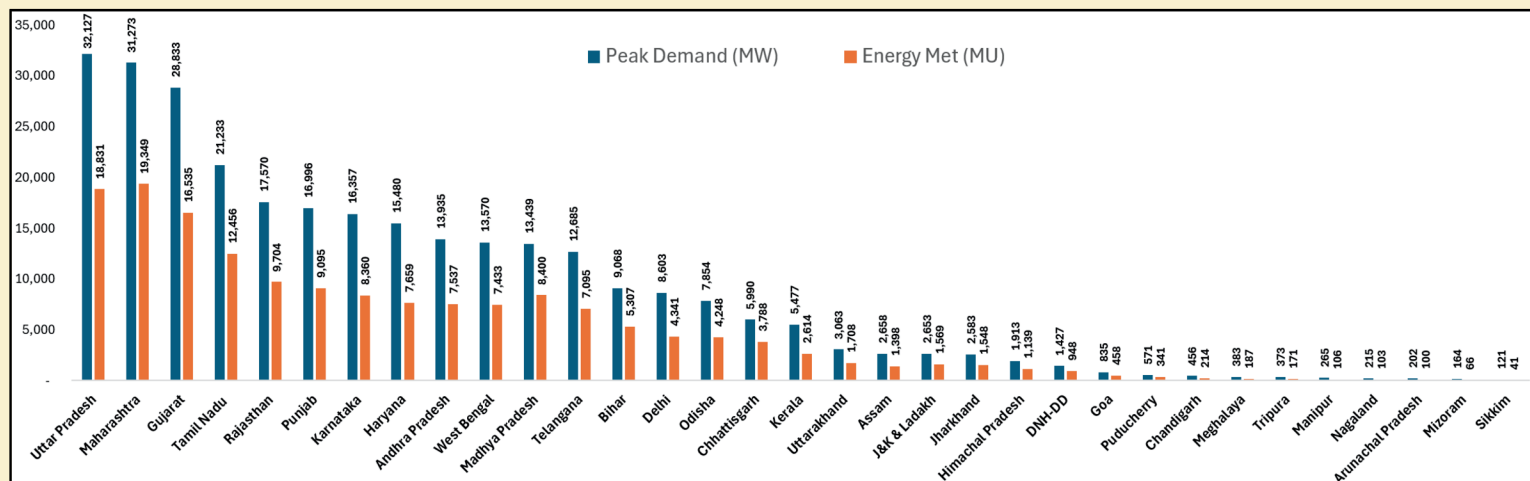
Source: Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

Figure 4: STATE-WISE PEAK DEMAND (MW) & ENERGY MET (MU) IN JUNE 2026



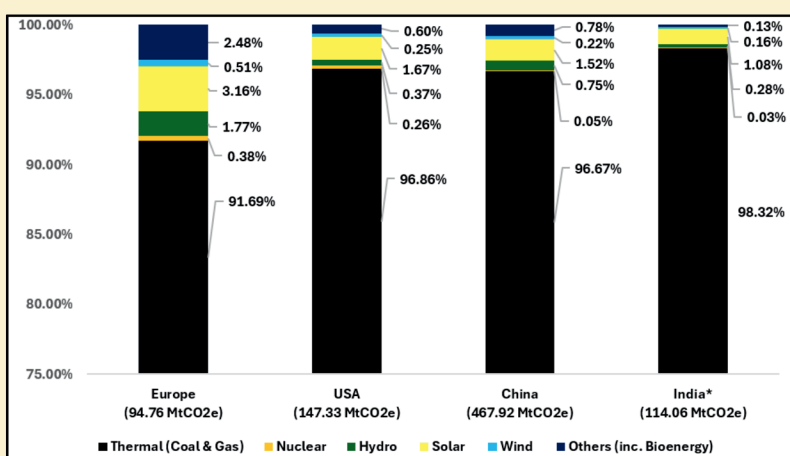
Source: GRID India (Daily PSP Report)

Table 4: MONTHLY GENERATION OF MAJOR ECONOMIES- JUNE 2026

Countries	Europe	USA	China	India
Thermal	124	222	484	122
Nuclear	69	70	43	6
Hydro	70	23	146	14
Solar	62	51	148	19
Wind	40	42	78	14
Others	13	5	16	0
Total (BU)	377	413	915	175

Source: Ember Energy Data (2026)

Figure 5: SHARE OF EMISSIONS IN ELECTRICITY (%) OF MAJOR ECONOMIES - JUNE 2026



Note: Electricity emissions are reported on a full lifecycle basis, in MtCO_{2e}

*Data for India is as per May 2026

Source: Ember Energy Data (2026)

KEY HIGHLIGHTS

- 28 SERCs have issued Tariff Orders for True-up of FY 2024-25 and ARR of FY 2026-27 till 30.06.2026:
 - 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, 5.05% by MNER, 6.23% by CSERC and by TERC
 - AERC, APERC, HERC, OERC, GERC, MZERC, MSERC, UERC, TGERC, RERC & APSERC have announced no change in Tariff
 - KERC issued True-up. KERC, MERC and JERC (Goa & UTs) have issued MYT Orders which include Tariffs for FY 2026-27.
- Ministry of Coal notified Coal Exchange Rules, 2026 on 4/06/2026. The Rules covers important components of coal contracts including bidding, price discovery, scheduling, delivery and provide that the final price of the traded coal be adjusted in accordance with the quality of coal being traded, which shall be assessed by any coal sampling agency recognised by the Coal Controller Organisation.
- CERC has issued the draft CERC (Deviation Settlement Mechanism and Related Matters) (Third Amendment) Regulations, 2026, proposing significant changes to the existing Deviation Settlement Mechanism framework. The proposed amendments seek to strengthen grid discipline, align deviation settlement with evolving market conditions, and provide a clearer regulatory framework for renewable energy and energy storage projects.
- India has 102 GWp potential of floating solar energy, as per a new NISE report. Combined with land-based potential (3,343 GWp), India's total solar potential now stands at 3,445 GWp. Maharashtra (16.28 GW), Madhya Pradesh (14.89 GW), Karnataka (13.69 GW), Odisha (12.81 GW), and Telangana (10.72 GW) have the highest floating solar potential.

[All data was last accessed on 17th July 2026]



POWER FOUNDATION OF INDIA

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