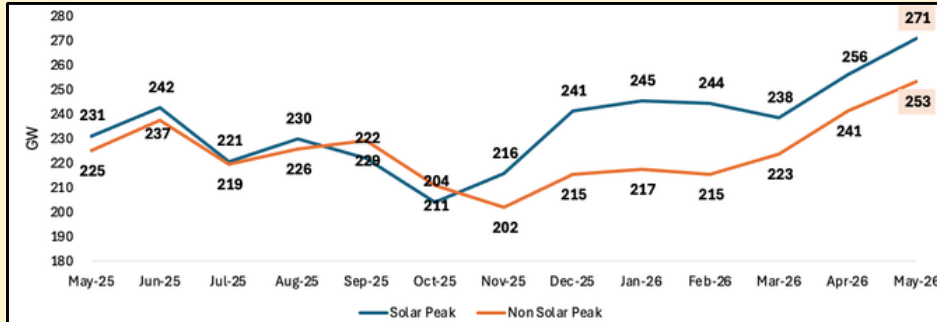


MONTHLY SNAPSHOT

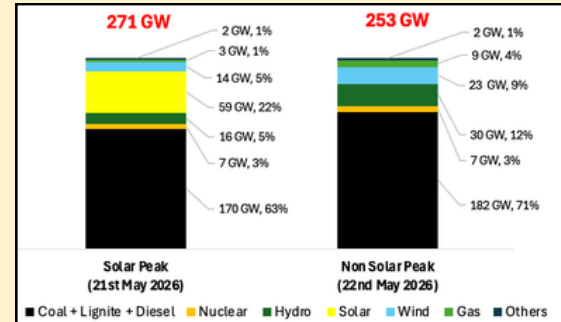
INDIA POWER SECTOR: MAY 2026

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)

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Source		2030 Target	Under Planning*	Under Construction	May-26	Y-o-Y Growth
Fossil Sources		277	47	39	251	4%
Thermal	Coal & Lignite	252	47	39	230	5%
	Diesel & Gas	25			21	0%
Non-Fossil Sources		482	90	139	292	24%
Nuclear		15	7	7	9	0%
Hydro	Large^	54	20	13	52	8%
	Small	5			5	2%
Solar	Ground Mounted Solar	293	35	90	119	41%
	Solar Rooftop				28	52%
	Hybrid Solar				4	34%
	Off-grid Solar/KUSUM				6	26%
Wind		100	14	29	57	11%
Other		15	14		12	1%
Total		759	137	179	542	14%
Pumped Storage Plants		19	7	16	7	56%
Battery Energy Storage System (GW/GWh)		41.65/208.25	15.26/41.54	26.44/94.78	2.72/7.50	-

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)

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Source	May-26	Y-o-Y Growth
Thermal	124	8.8% ↑
Nuclear	6	11% ↑
Hydro	Large	-4% ↓
	Small	-20% ↓
Solar	22	51% ↑
Wind	11	7% ↑
Other (Biomass, Bagasse)	0.9	6% ↑
Total	177	11.3% ↑

Source: Central Electricity Authority

Table 3: TRANSMISSION INFRASTRUCTURE

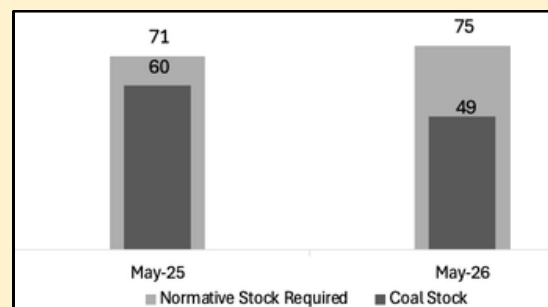
Table 3: TRANSMISSION INFRASTRUCTURE					
Parameter	NEP Target (2032)	Under Planning ^a	Under Construction ^a	May-26	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	63	509	3%
ISTS	295	43	30	221	3%
InSTS	354	33	33	287	2%
Transformation capacity ('000 MVA)	2,412	530	413	1469	8%
ISTS	1,281	348	293	640	13%
InSTS	1,131	182	120	829	5%
Inter-regional Trans. Capacity (GW)	168			120	1%

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

^aConsidering capacity to be added during FY 2022-27 as under construction stage

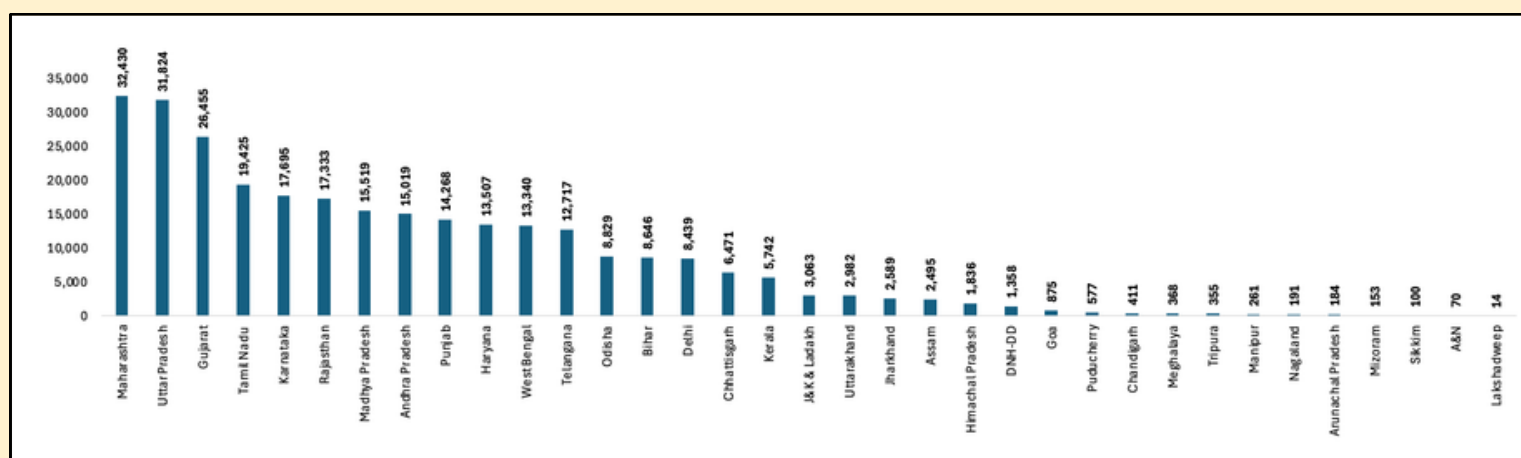
Source: NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

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



Source: Central Electricity Authority

KEY HIGHLIGHTS

- Unit-4 (250 MW Hydro Power Plant) of NHPC's Subansiri Lower, Unit-2 (800 MW Thermal Power Plant) of PVUNL Patratu TPS, Unit-3 (800 MW Thermal Power Plant) of TGGENCO's Yadadri TPS were added in the Indian Grid in the month of May 2026
- On May 21, 2026, India met its all-time highest peak electricity demand of 270.82 GW at 15:45 hours. Peak demand was met through a power generation mix comprising thermal power at 62.8%, Solar at 22%, Wind at 5%, Hydro at 5% and others.
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- CERC has proposed a one-time mechanism for treatment of connectivity granted under the GNA Regulations, where the corresponding PPA has not been signed within 12 months from the date of issuance of the Letter of Award. CERC proposed three options: entity may exit the LoA route without surrendering connectivity, substitute the original LoA with another executed PPA and entity may surrender the connectivity.
- 20 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, 5.05% by MNERC and by TERC
 - AERC, APERC, HERC, OERC, GERC, MZERC, MSERC, UERC, TGERC, RERC & APSERC have announced no change in Tariff
 - KERC issued True-up

[All data was last accessed on 25th June 2026]



POWER FOUNDATION OF INDIA

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