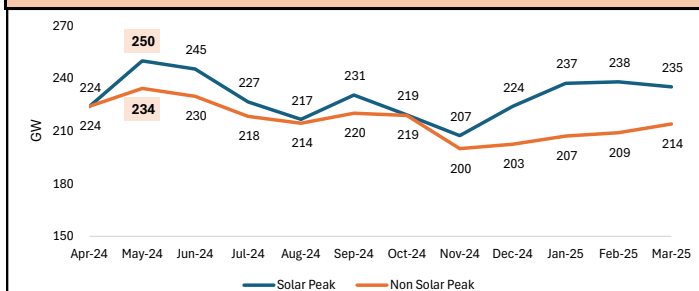


MONTHLY SNAPSHOT - INDIA POWER SECTOR : MARCH 2025

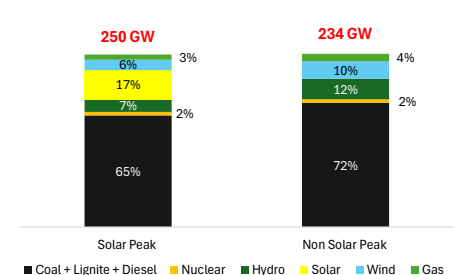


PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (235 GW) on 11th March 2025 @ 10:26 hrs
2) Non Solar Peak (214 GW) on 27th March 2025 @ 19:26 hrs
Source: Grid India

Source-wise contribution in Peak Demand [EFFECTIVE CAPACITIES]



Note: Contribution mix at the maximum Solar Peak and Non-Solar Peak recorded in the last 12 months; Source: Grid India

INSTALLED CAPACITY (GW)

Source		Mar-25	Y-o-Y Growth
Thermal	Coal & Lignite	222	2%
	Diesel & Gas	25	-2%
Nuclear		8	0%
Hydro	Large	48	2%
	Small	5	2%
Solar	Ground Mounted Solar	81	26%
	PM-Surya Ghar Yojna (Solar Rooftop)	17	43%
	Hybrid Solar	3	12%
	Off-grid Solar/KUSUM	5	60%
Wind		50	9%
Other		12	6%
Total		475	8%
Pumped Storage Plants		5	0%

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

MONTHLY GENERATION (BU)

Source		Mar-25	% Growth from Mar-24
Thermal		123	3% ↑
Nuclear		5	17% ↑
Hydro	Large	9	25% ↑
	Small *	0.6	20% ↑
Solar *		15	25% ↑
Wind *		5	2% ↑
Other *		0.3	-87% ↓
Total		157	5% ↑

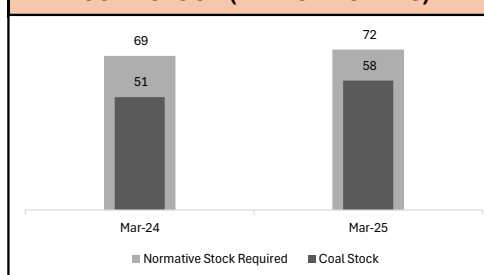
Source: Central Electricity Authority; Ministry of New and Renewable Energy

TRANSMISSION INFRASTRUCTURE

Parameter	Mar-25	Addition over previous month
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	494	1.95
ISTS	214	0.63
InSTS	280	1.32
Transformation capacity ('000 MVA)	1,338	28.95
ISTS	556	12.00
InSTS	782	16.95
Inter-regional Transmission Capacity (GW)	119	-

Source: Central Electricity Authority

COAL STOCK (MILLION TONNES)



Source: National Power Portal

KEY HIGHLIGHTS

- India achieved a historic milestone by adding 25 GW of Renewable Energy capacity in FY 2024-25, 35% increase over FY 2023-24.
- India's coal production has reached 1.05 billion metric tonnes (Provisional) in FY 2024-25, surpassing 1 billion metric tonnes of coal production, and recording 5% growth over FY 2023-24. Coal imports dropped by 8% in April-December 2024 as compared to the same period in 2023.
- Various SERCs have issued Tariff Orders for True-up of FY 2023-24 and ARR of FY 2025-26:
 - HERC has hiked Tariff by 9.41%, waived off the Minimum Monthly Charges (MMC) for Domestic consumers.
 - MERC has approved 10% reduction in Tariff and cumulative 16% reduction by FY 2029-30.
 - KERC reduced cross-subsidisation levels in the Tariff structure for FY 2025-26.
 - PSERC and GERC have announced no change in Tariff.
 - MPERC announced a 3.46% hike in Tariff across various categories.

[All data was last accessed on 25th April 2025]

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