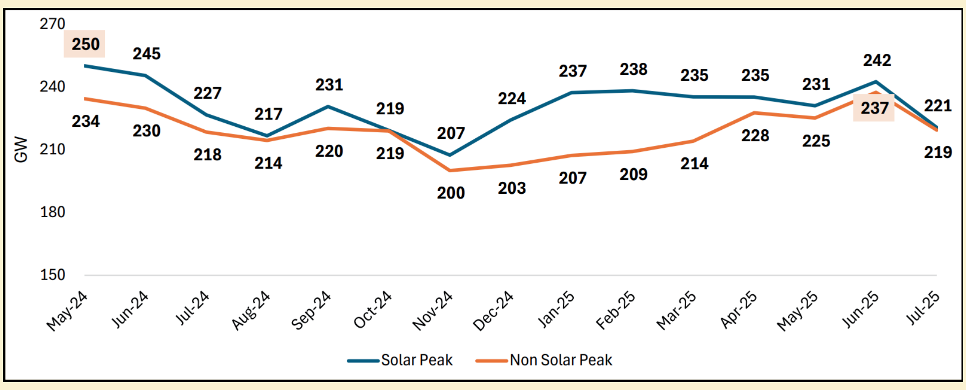
MONTHLY SNAPSHOT

INDIA POWER SECTOR: JULY 2025

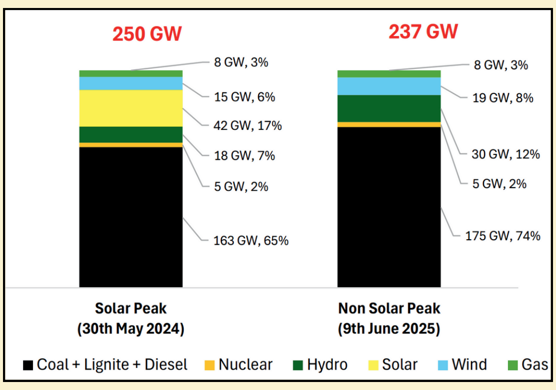
Power Foundation of India

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% ↑
	Small	1.2	-12% ↓
Solar		12	13% ↑
Wind		14	5% ↑
Other (Biomass, Bagasse)		0.1	-91% ↓
Total		**160**	**-0.1%** ↓

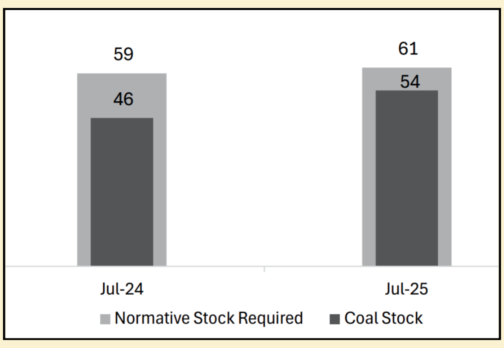
Note: *Generation through Renewable Energy (RE) sources is prepared from Cumulative Daily generation reports of July 2025 since Monthly RE generation report has yet not been uploaded on CEA website. SHP generation has been provisionally kept as per June'25*
Source: *Central Electricity Authority; Ministry 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**	**0%**

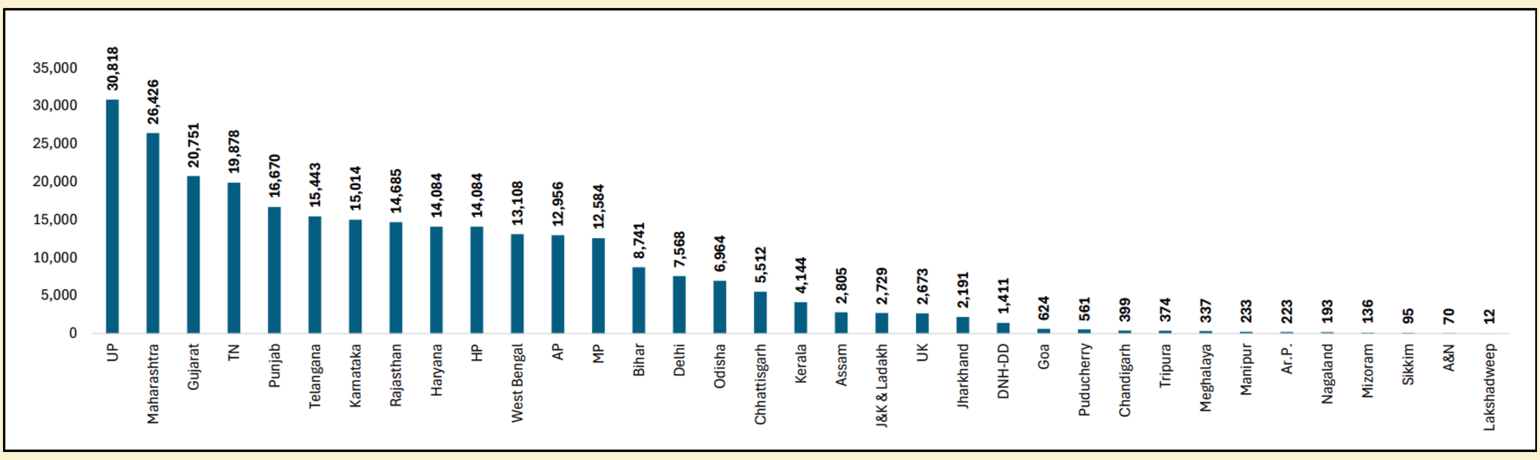
Note: *^ Considering capacity to be added during FY 2027-32 as under planning stage; *Considering capacity to be added during FY 2022-27 as under construction stage*
Source: *NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority*

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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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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