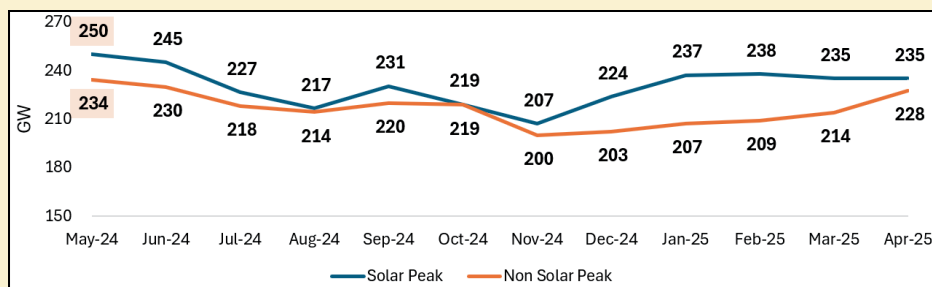


MONTHLY SNAPSHOT

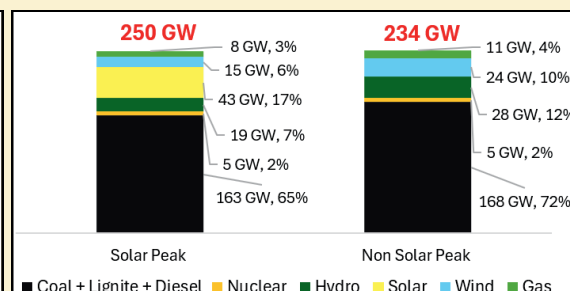
INDIA POWER SECTOR: APRIL 2025

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (235 GW) on 25th April 2025 @ 15:32 hrs
2) Non Solar Peak (228 GW) on 24th April 2025 @ 22:30 hrs
Source: Grid India

Figure 2: 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

Table 1: INSTALLED CAPACITY (GW)

Source		2030 Target	Under Planning^	Under Construction*	Apr-25	Y-o-Y Growth
Fossil Sources		277	52	32	240	-1%
Thermal	Coal & Lignite	252	52	32	219	1%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		482	115	165	232	16%
Nuclear		15	7	7	9	7%
Hydro	Large	54	24	13	48	2%
	Small	5			5	2%
Solar	Ground Mounted Solar	293	84	79	82	27%
	Solar Rooftop				18	47%
	Hybrid Solar				3	12%
	Off-grid Solar/KUSUM				5	64%
Wind		100	-	26	51	11%
Other		15			12	6%
Total		758	166	197	472	-26%
Pumped Storage Plants		19	4	10	5	0%
Battery Energy Storage System (GW/GWh)		41.65/208.25	-	14.97/54.80	-	-

* As of March 2025; ^Estimated wherever actuals are not available
Source: Central Electricity Authority; Ministry of New and Renewable Energy; Optimal Generation Mix Report; Parliament Q&A

Table 2: MONTHLY GENERATION (BU)

Source		Apr-25	Y-o-Y Growth
Thermal		119	-4% ↓
Nuclear		5	11% ↑
Hydro	Large	10	18% ↑
	Small	0.7	16% ↑
Solar		16	32% ↑
Wind		6	34% ↑
Other (Biomass, Bagasse)		1.0	-23% ↓
Total		157	1.7% ↑

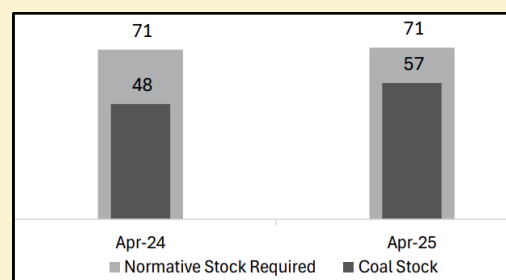
Source: Central Electricity Authority, Ministry of New and Renewable Energy

Table 3: TRANSMISSION INFRASTRUCTURE

Parameter	NEP Target (2032)	Under Planning^	Under Construction*	Apr-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	7	51	495	2%
ISTS	295			214	2%
InSTS	354			280	2%
Transformation capacity ('000 MVA)	2,412	19	247	1,351	8%
ISTS	1,281			565	9%
InSTS	1,131			786	7%
Inter-regional Trans. Capacity (GW)	168			119	0%

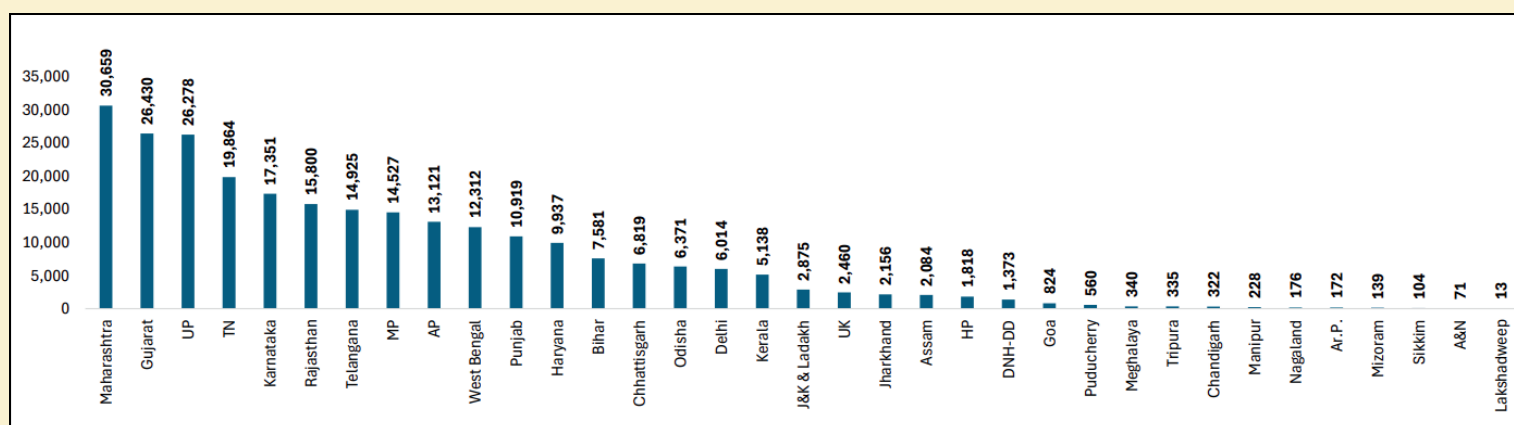
NEP: National Electricity Plan (Volume II) Transmission; Source: Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

Figure 4: STATE-WISE PEAK DEMAND (MW) IN APRIL-2025



Source: Central Electricity Authority

KEY HIGHLIGHTS

- The Government has launched the "Green Hydrogen Certification Scheme of India" to enable verified green hydrogen production under strict emission limits, through a BEE-accredited process. It aims to build a transparent, credible green hydrogen market aligned with the National Green Hydrogen Mission's 2030 decarbonization goals.
- The Central Electricity Authority (CEA) has launched STELLAR, an indigenously developed resource adequacy planning tool to assist states and DISCOMs in optimizing power system expansion and ensuring grid reliability.
- The Central Electricity Regulatory Commission (CERC) has directed power exchanges to standardize Term-Ahead Market (TAM) contracts by discontinuing user-defined time slots and adopting pre-specified slots such as Base/RTC, Peak, Off-Peak, and Night, as defined by the National Load Despatch Centre (NLDC), and align the delivery to be 2.5 hours ahead for the Intra-Day transactions.
- FY 2023-24 True-Up issued for 16/36 States/UTs, FY 2025-26 ARR Order issued for 19/36 States/UTs:
 - Jharkhand: 19% Tariff hike, increase in Energy Charges for all consumer categories except Agriculture and Street Lights, no change in Fixed Charges for any category.
 - Bihar: no change in Tariff, Green tariff @ Rs. 0.42/kWh over and above applicable tariff, kVAh Tariff for Non-Domestic Consumers in place of kWh.
 - Telangana: no change in Tariff, Contracted Load limit for LT EV Charging Stations increased from 56 kW/75 HP to 150 kW/ 201 HP.
 - Himachal Pradesh: Rs. 0.12/kWh average reduction in Energy Charges, merged existing higher two Domestic Slabs into one.



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