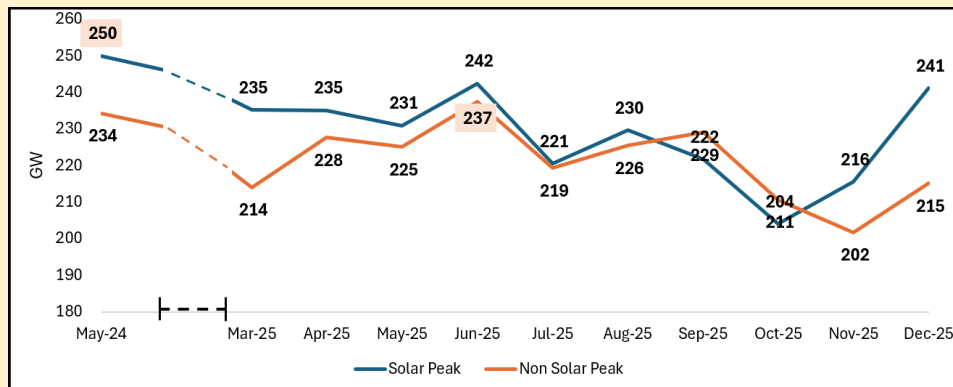


MONTHLY SNAPSHOT

INDIA POWER SECTOR: DECEMBER 2025

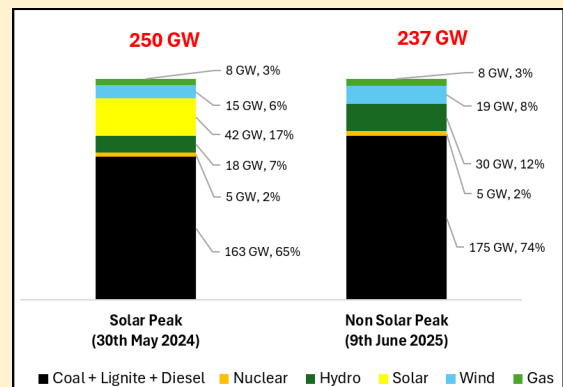
Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (241 GW) on 31st December 2025 @10:39 hrs
2) Non Solar Peak (215 GW) on 31st December 2025 @18:20 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	Dec-25	Y-o-Y Growth
Fossil Sources		277	47	38	247	1%
Thermal	Coal & Lignite	252	47	38	226	3%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		482	96	118	267	23%
Nuclear		15	7	7	9	7%
Hydro	Large^	54	21	13	51	8%
	Small	5			5	1%
Solar	Ground Mounted Solar	293	37	69	103	37%
	Solar Rooftop				24	51%
	Hybrid Solar				3	21%
	Off-grid Solar/KUSUM				6	32%
Wind		100	16	30	55	13%
Other		15	16		12	2%
Total		759	143	156	514	11%
Pumped Storage Plants		19	11	12	7	51%
Battery Energy Storage System (GW/GWh)		41.65/208.25		25.41/77.09	-	-

Note: *Data extracted from Reply by MoP to Lok Sabha Unstarred Question No. 1904 dated 11/12/2025;

^ 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)

Source		Dec-25	Y-o-Y Growth
Thermal		113	4.8% ↑
Nuclear		4	-18% ↓
Hydro	Large	9	13% ↑
	Small	0.7	-10% ↓
Solar		15	40% ↑
Wind		5	-13% ↓
Other (Biomass, Bagasse)		2.6	5% ↑
Total		150	6.3% ↑

Source: Central Electricity Authority

Table 3: TRANSMISSION INFRASTRUCTURE

Parameter	NEP Target (2032)	Under Planning [^]	Under Construction*	Dec-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	72	499	2%
ISTS	295	43	35	216	1%
InSTS	354	33	37	283	2%
Transformation capacity ('000 MVA)	2,412	530	475	1407	8%
ISTS	1,281	348	334	599	11%
InSTS	1,131	182	140	808	7%
Inter-regional Trans. Capacity (GW)	168			120	1%

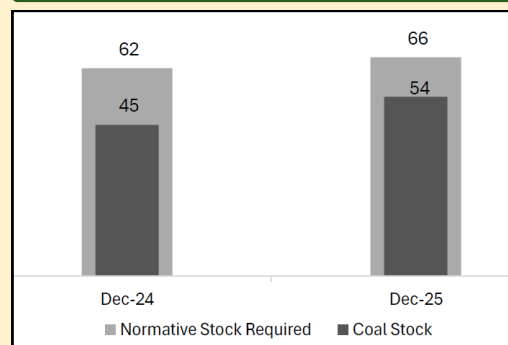
Note: [^]Considering capacity to be added during FY 2027-32 as under planning stage;

*Considering capacity to be added during FY 2022-27 as under construction stage

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

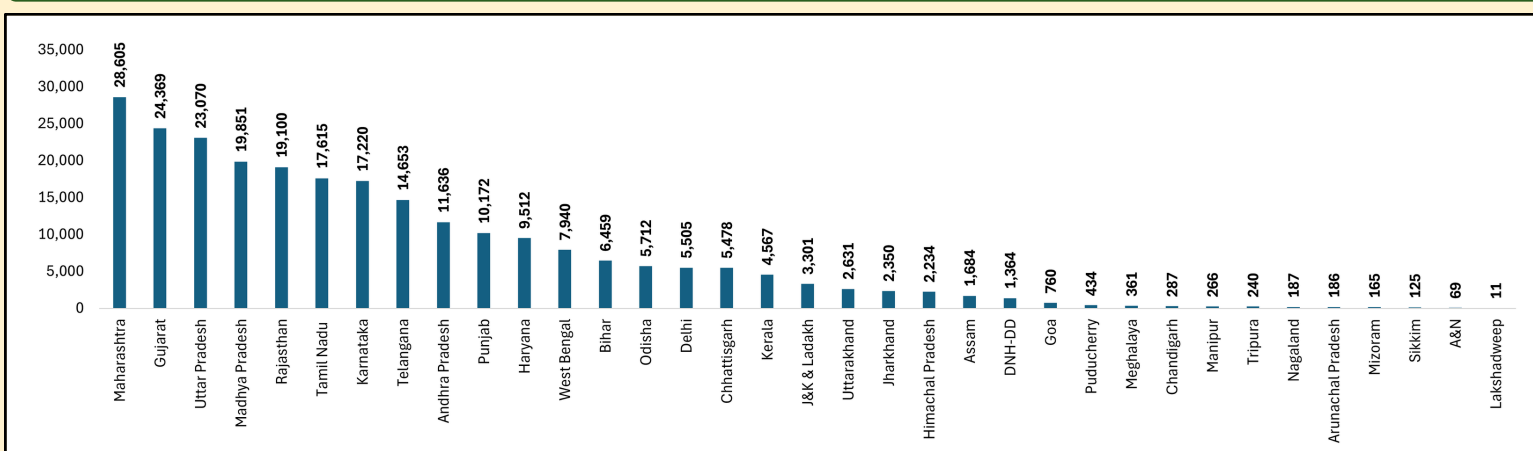
Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

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



Source: Central Electricity Authority

KEY HIGHLIGHTS

- Unit-3 (250 MW Hydro Power Plant) of THDC Tehri PSP and Unit-2 (250 MW Hydro Power Plant) of NHPC Subansiri Lower HEP was added in the Indian Grid in the month of December 2025.
- CERC notified Guidelines for Virtual Power Purchase Agreements (VPPA) wherein VPPA shall be a bilateral Over The Counter Contracts between Renewable Energy Generating Stations and Designated Consumers having duration of at least 1 year.
- GoI has released Grant of Rs. 37,000 Cr. under Revamped Distribution Sector Scheme which is about 38 % of the total sanctioned Gross Budgetary Support for the scheme.
- CERC taken cognizance of the Notification dated 17/09/2025 and directed Generators to compute the net impact on the landed coal cost, station-wise and month-wise and refund the amount payable to the Discoms/Beneficiaries, as a result of such a change in law event.

[All data was last accessed on 29th January 2026]



POWER FOUNDATION OF INDIA

PFI is a Policy Research and Advocacy entity registered as a society under the aegis of Ministry of Power (MoP), Government of India. 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.

B-28, Qutab Institutional Area, New Delhi 110016

✉: info@powerfoundation.org.in 🌐: www.powerfoundation.org.in ☎: 011-6965 0000