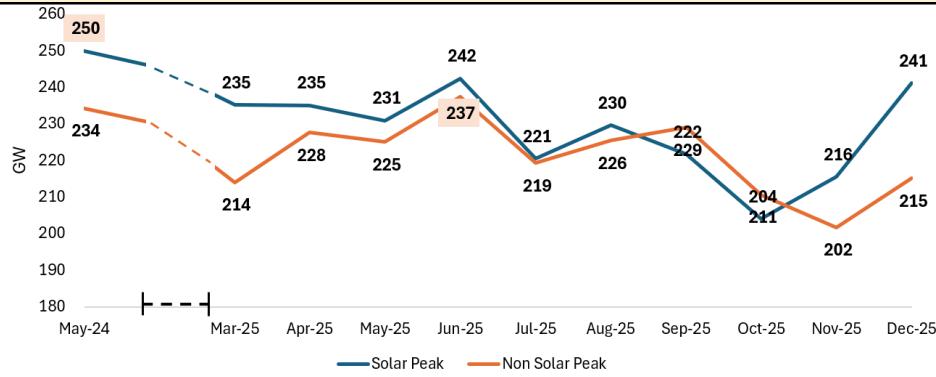


# MONTHLY SNAPSHOT

## INDIA POWER SECTOR: DECEMBER 2025

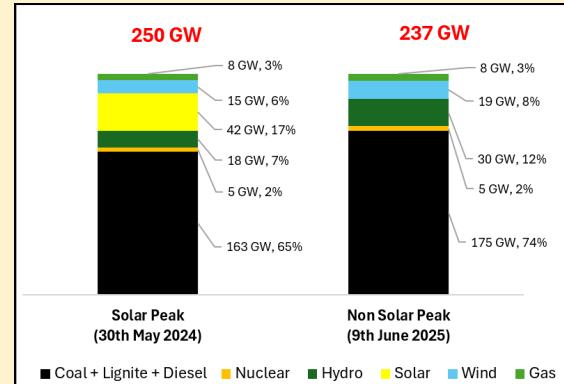
Figure 1: PEAK DEMAND MONTHLY TREND



**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
<b>Fossil Sources</b>	<b>277</b>	<b>47</b>	<b>38</b>	<b>247</b>	<b>1%</b>
Thermal	Coal & Lignite	252	47	226	3%
	Diesel & Gas	25		21	-18%
<b>Non-Fossil Sources</b>	<b>482</b>	<b>96</b>	<b>118</b>	<b>267</b>	<b>23%</b>
Nuclear	15	7	7	9	7%
Hydro	Large <sup>A</sup>	54	21	51	8%
	Small	5		5	1%
Solar	Ground Mounted Solar			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%
<b>Total</b>	<b>759</b>	<b>143</b>	<b>156</b>	<b>514</b>	<b>11%</b>
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;

<sup>A</sup> 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% <span style="color: green;">▲</span>
Nuclear	4	-18% <span style="color: red;">▼</span>
Hydro	9	13% <span style="color: green;">▲</span>
	0.7	-10% <span style="color: red;">▼</span>
Solar	15	40% <span style="color: green;">▲</span>
Wind	5	-13% <span style="color: red;">▼</span>
Other (Biomass, Bagasse)	2.6	5% <span style="color: green;">▲</span>
<b>Total</b>	<b>150</b>	<b>6.3% <span style="color: green;">▲</span></b>

**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 ( $\geq 220$ 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%

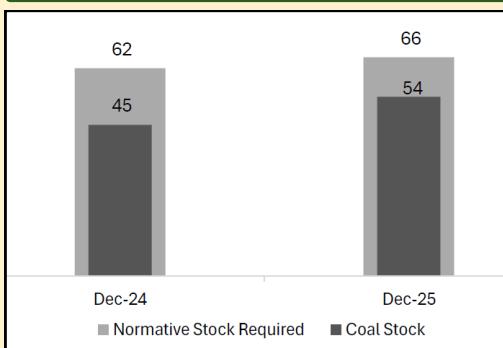
**Note:** ^Considering capacity to be added during FY 2027-32 as under planning stage;

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

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

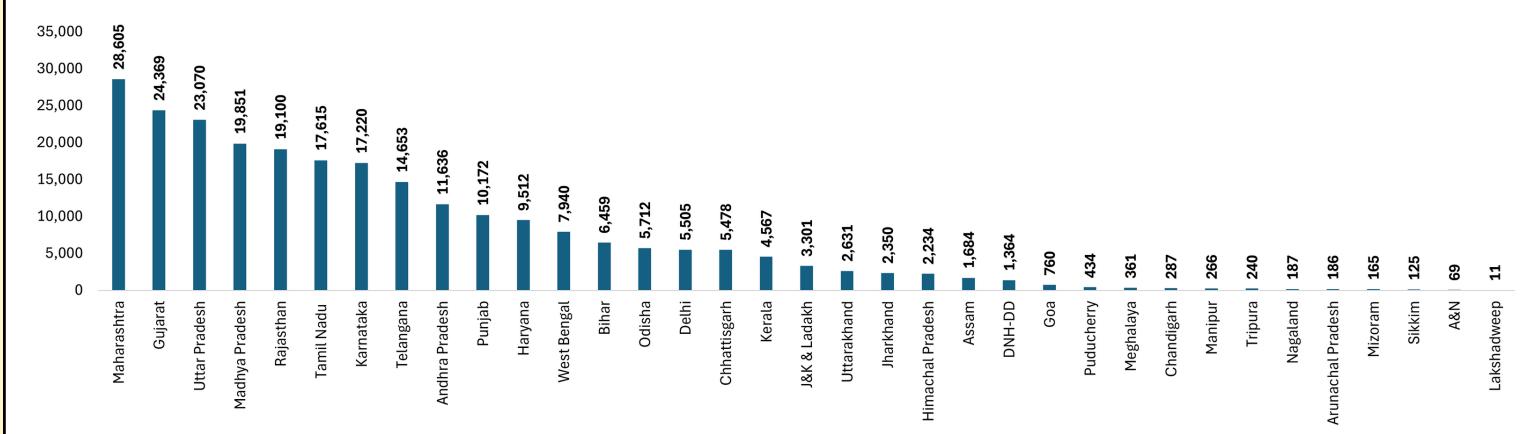
Central Electricity Authority

**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

1. 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.
2. 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.
3. 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.
4. 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.