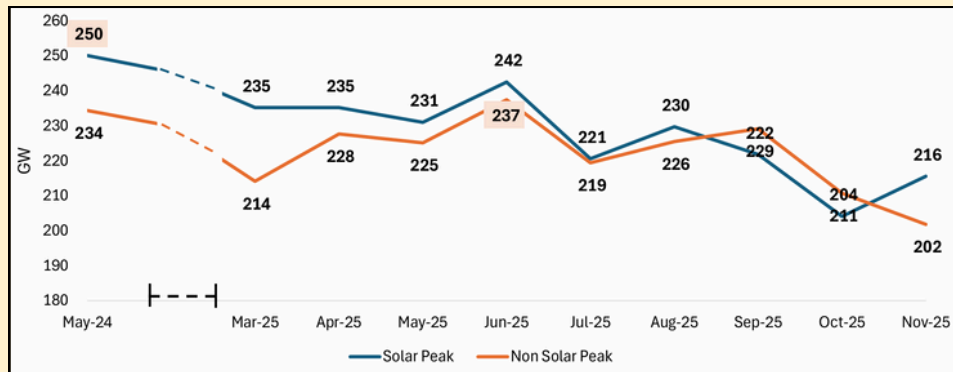


MONTHLY SNAPSHOT

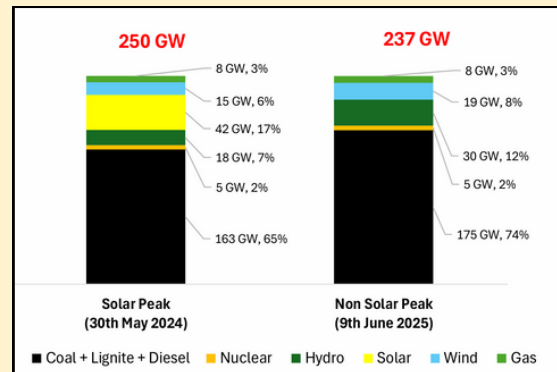
INDIA POWER SECTOR: NOVEMBER 2025

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (216 GW) on 28th November 2025 @10:24 hrs
 2) Non Solar Peak (202 GW) on 28th November 2025 @17:57 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	Nov-25	Y-o-Y Growth
Fossil Sources		277	47	36	247	2%
Thermal	Coal & Lignite	252	47	36	226	4%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		482	97	119	263	23%
Nuclear		15	7	7	9	7%
Hydro	Large^	54	21	13	50	7%
	Small	5			5	1%
Solar	Ground Mounted Solar	293	37	69	101	40%
	Solar Rooftop				23	53%
	Hybrid Solar				3	21%
	Off-grid Solar/KUSUM				6	35%
Wind		100	16	30	54	13%
Other		15	16		12	2%
Total		759	144	154	510	12%
Pumped Storage Plants		19	7	12	7	46%
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		Nov-25	Y-o-Y Growth
Thermal		98	-6.1% ↓
Nuclear		4	-20% ↓
Hydro	Large	10	14% ↑
	Small	0.3	-64% ↓
Solar		13	18% ↑
Wind		4	34% ↑
Other (Biomass, Bagasse)		0.6	-64% ↓
Total		130	-3.4% ↓

Note: Generation through Renewable Energy sources is prepared from Cumulative Daily generation reports of November 2025, which do not capture SHP separately. Hence, SHP generation has been provisionally kept in the same ratio as of 'SHP: Others' as per November 2024.

Source: Central Electricity Authority

Table 3: TRANSMISSION INFRASTRUCTURE

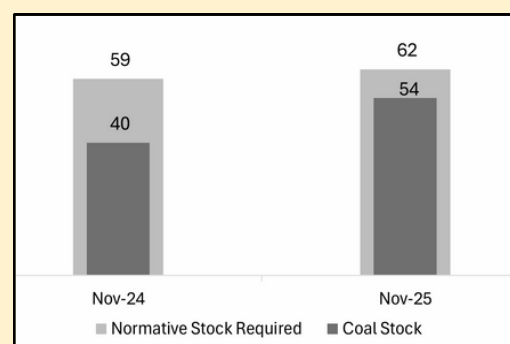
Parameter	NEP Target (2032)	Under Planning [^]	Under Construction [*]	Nov-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	73	498	1%
ISTS	295	43	36	215	1%
InSTS	354	33	37	283	2%
Transformation capacity ('000 MVA)	2,412	530	484	1398	8%
ISTS	1,281	348	339	594	10%
InSTS	1,131	182	145	804	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

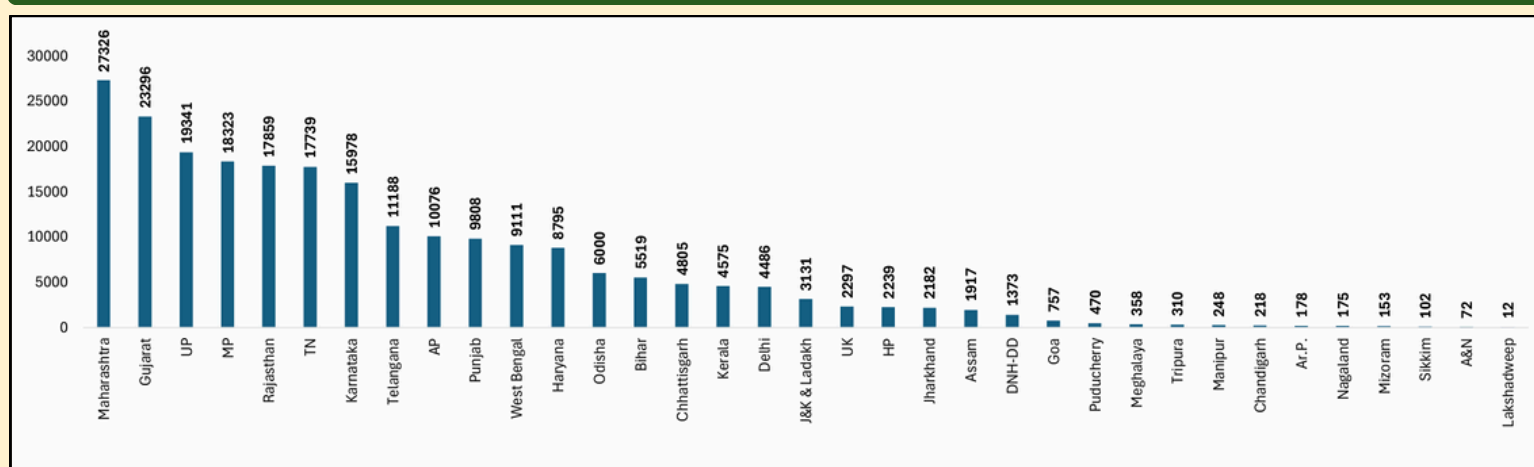
Source: NEP: National Electricity Plan (Volume II) Transmission;
Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

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



Source: Central Electricity Authority

KEY HIGHLIGHTS

1. CERC has issued a Staff Paper proposing for allocation of connectivity granted through the LoA route in cases where signing of the PPA/PSA is delayed aiming to address sub-optimal utilisation of associated transmission infrastructure, which has resulted in delays of approximately 45.34 GW of granted Connectivity.
2. Ministry of Power issued guidelines for Tariff Based Competitive Bidding Process for Procurement of Power from Grid Connected Waste to Energy (WtE) Projects using Municipal Solid Waste (MSW)-derived fuels, applicable to new projects and requiring alignment of ongoing bids with submission deadlines beyond 90 days. The guidelines mandate project preparedness by the implementing agency, prescribe single-stage two-envelope-e-bidding with selection based on the lowest levelised tariff or lowest Viability Gap Funding requirement, stipulate a minimum 20-year PPA tenure from the Scheduled Commencement of Supply Date and accord must-consume status to WtE power.
3. Madhya Pradesh Government has launched the 'Samadhan Yojana 2025-26', a one-time settlement scheme to recover approx. ₹12,000 crore in long-pending electricity dues from about 9.2 million defaulting consumers by offering graded waivers of delayed payment surcharge (DPS) of up to 90 percent.
4. SJVN Ltd. commissioned Unit-1 of 660 MW of the 1,320 MW Buxar TPP in Bihar and Neyveli UP Power Ltd. commissioned Unit-2 of 660 MW of the 1,980 MW Ghatampur TPP in Uttar Pradesh.

[All data was last accessed on 23rd December 2025]



POWER FOUNDATION OF INDIA

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