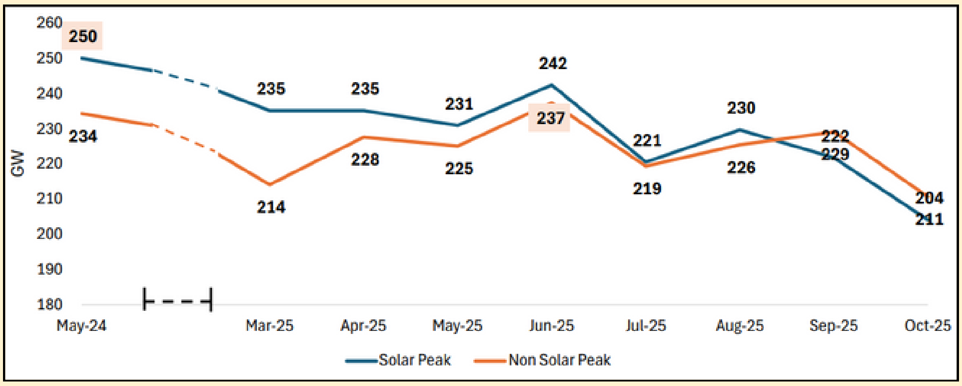
MONTHLY SNAPSHOT

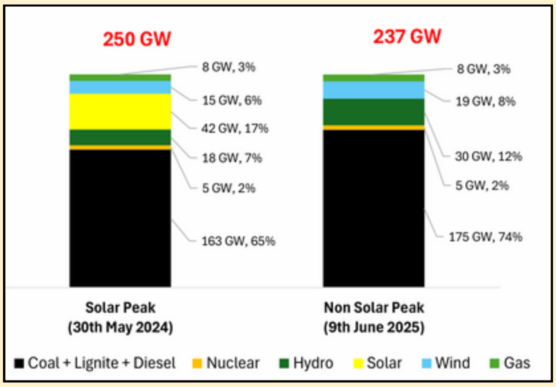
INDIA POWER SECTOR: OCTOBER 2025

Figure 1: PEAK DEMAND MONTHLY TREND



Note: *1) Solar Peak (204 GW) on 17th October 2025 @11:41 hrs*
2) Non Solar Peak (211 GW) on 16th October 2025 @18:40 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	Oct-25	Y-o-Y Growth
Fossil Sources		**277**	**48**	**37**	**246**	**1%**
Thermal	Coal & Lignite	252	48	37	225	3%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		**482**	**75**	**136**	**259**	**23%**
Nuclear		15	7	7	9	7%
Hydro	Large^	54	21	13	50	7%
	Small	5			5	2%
Solar	Ground Mounted Solar	293	26	91	99	39%
	Solar Rooftop				22	55%
	Hybrid Solar				3	26%
	Off-grid Solar/KUSUM				5	37%
Wind		100	20	26	54	12%
Other		15			12	2%
Total		**759**	**122**	**173**	**505**	**11%**
Pumped Storage Plants		19	7	12	7	46%
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 07/08/25;*
^ 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		Oct-25	Y-o-Y Growth
Thermal		98	-14.3%
Nuclear		5	1%
Hydro	Large	16	14%
	Small	0.6	-56%
Solar		13	4%
Wind		6	80%
Other (Biomass, Bagasse)		0.3	-56%
Total		**138**	**-8.3%**

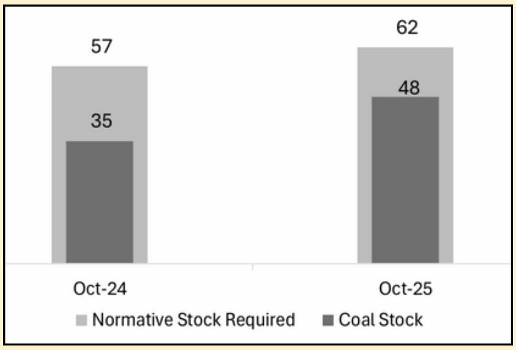
Note: *Generation through Renewable Energy sources is prepared from Cumulative Daily generation reports of October 2025, which do not capture SHP separately. Hence, SHP generation has been provisionally kept in the same ratio as of 'SHP: Others' as of October 2024.*
Source: *Central Electricity Authority*

Table 3: TRANSMISSION INFRASTRUCTURE

Parameter		NEP Target (2032)	Under Planning^	Under Construction*	Oct-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)		**648**	**77**	**74**	**498**	**1%**
	ISTS	295	43	36	215	1%
	InSTS	354	33	38	282	2%
Transformation capacity ('000 MVA)		**2,412**	**530**	**492**	**1390**	**8%**
	ISTS	1,281	348	344	589	10%
	InSTS	1,131	182	148	801	7%
Inter-regional Trans. Capacity (GW)		**168**			**120**	**1%**

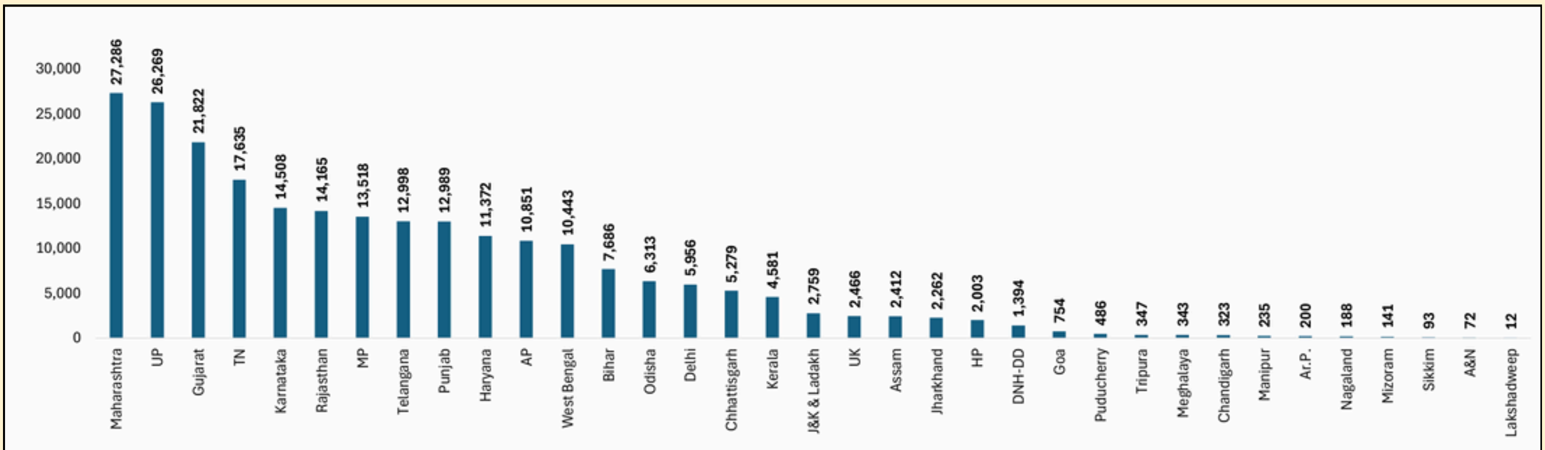
Note: *^Considering capacity to be added during FY 2027-32 as under planning stage; *Considering capacity to be added during FY 2022-27 as under construction stage*
Source: *NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority*

Figure 3: COAL STOCK (million metric tonnes)



Source: *National Power Portal*

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



Source*: Central Electricity Authority*

KEY HIGHLIGHTS

1. Ministry of Power issued Draft Electricity (Amendment) Bill, 2025 proposing competition in the Distribution Sector by allowing usage of shared Distribution System; Deregulating consumers with load more than 1 MW; mentioning tariff to reflect cost of supply, eliminating cross-subsidy of Railways, Metro Railways and Manufacturing Enterprises with 5 years; issuance of Tariff Order before the beginning of next Financial Year; Increasing number of Members in APTEL, Specifying the penalty for noncompliance of RPO/RCO etc.

2. India's installed electricity capacity crossed 500 GW on October 2025 with 51% from non-fossil fuel sources. Unit-1 (800 MW Coal Based Power Plant) of Patratu Super Thermal Power Project (Jharkhand) and Unit-5 (240 MW Hydro) of Greenko Energies's Pinnapuram Hydro Power Station added in the Indian Grid in the month of October 2025.

3. Rajasthan Electricity Regulatory Commission issued Tariff Order for FY 2025-26 and reduced the Regulatory Asset to Rs. 37,556 Cr. from Rs. 49,842 Cr. after considering Revenue surplus and recovery from Regulatory Assets Surcharge. RERC further allowed levy of Regulatory Surcharge of Rs. 0.42/kWh for Domestic Consumers (upto 100 units/month) & Rs. 0.72/kWh for other consumers.

[All data was last accessed on 25th November 2025]

Power Foundation of India

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