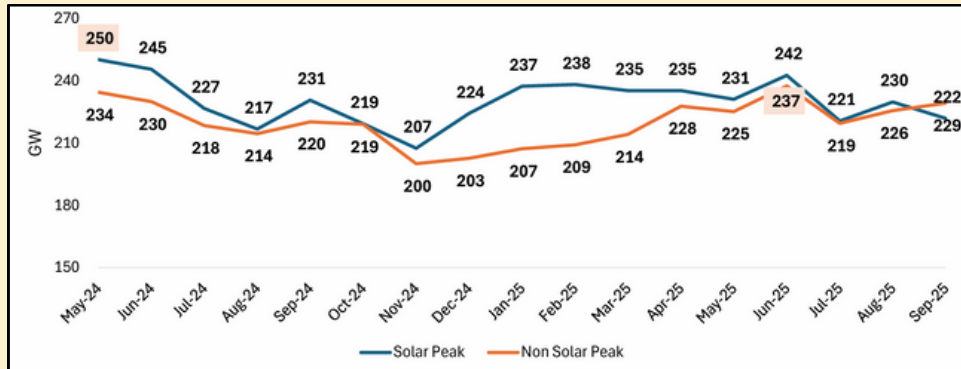


MONTHLY SNAPSHOT

INDIA POWER SECTOR: SEPTEMBER 2025

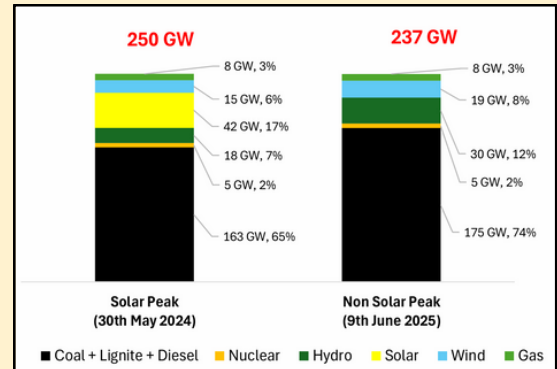
Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (222 GW) on 24th September 2025 @15:30 hrs
2) Non Solar Peak (229 GW) on 25th September 2025 @19:13hrs

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	Sep-25	Y-o-Y Growth
Fossil Sources		277	48	38	245	1%
Thermal	Coal & Lignite	252	48	38	224	3%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		482	75	140	256	22%
Nuclear		15	7	7	9	7%
Hydro	Large^	54	21	13	50	7%
	Small	5			5	1%
Solar	Ground Mounted Solar	293	26	94	97	39%
	Solar Rooftop				22	51%
	Hybrid Solar				3	24%
	Off-grid Solar/KUSUM				5	43%
Wind		100	20	26	53	12%
Other		15			12	2%
Total		759	122	177	501	11%
Pumped Storage Plants		19	7	12	7	41%
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		Sep-25	Y-o-Y Growth
Thermal		102	-0.2% ↓
Nuclear		4	-18% ↓
Hydro	Large	21	8% ↑
	Small	0.9	-46% ↓
Solar		13	13% ↑
Wind		10	9% ↑
Other (Biomass, Bagasse)		0.3	-46% ↓
Total		150	1.3% ↑

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

Source: Central Electricity Authority

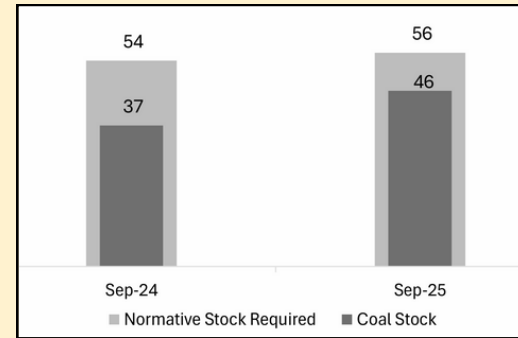
Table 3: TRANSMISSION INFRASTRUCTURE

Parameter	NEP Target (2032)	Under Planning^	Under Construction*	Sep-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	77	75	497	2%
ISTS	295	43	36	215	2%
InSTS	354	33	38	282	2%
Transformation capacity ('000 MVA)	2,412	530	500	1382	8%
ISTS	1,281	348	349	584	10%
InSTS	1,131	182	150	798	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.

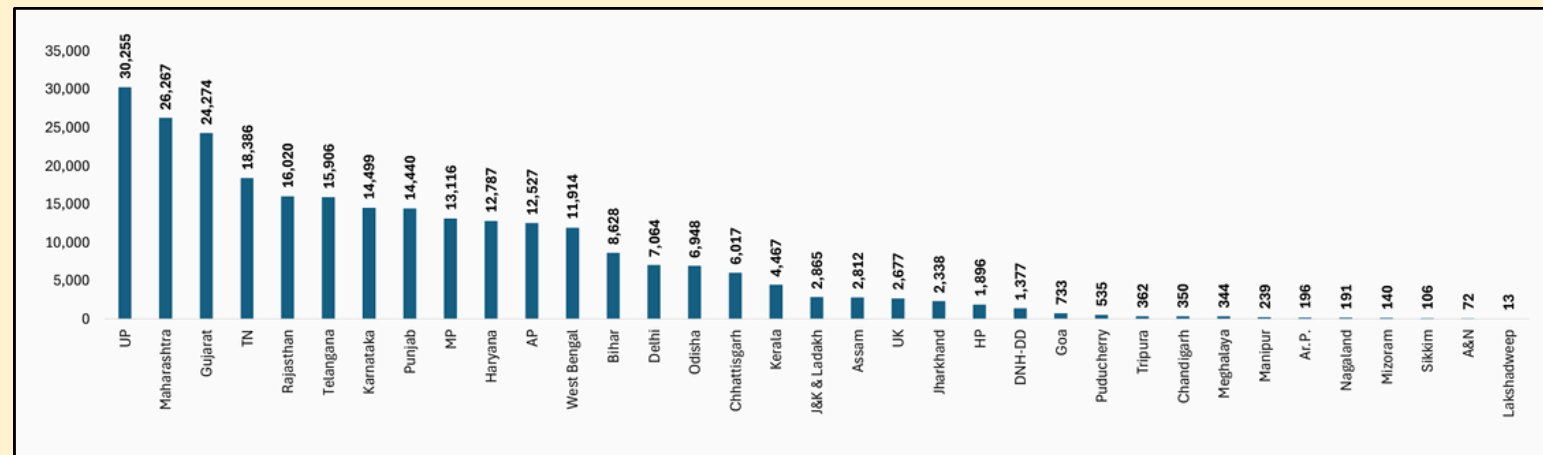
Source: NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

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



Source: Central Electricity Authority

KEY HIGHLIGHTS

- Unit-2 (660 MW Coal Based Power Plant) of Khurja Super Thermal Power Project, THDC India Limited (Uttar Pradesh) and 4684 MW of Non-Conventional capacity, mainly Solar 4202 MW, was added in the Indian Grid in the month of September 2025.
- Government of India has notified the National Policy on Geothermal Energy (2025) to leverage clean and reliable energy source for power generation.
- Government of India announced GST Reforms and reduced GST rates across the Renewable Energy value chain from 12% to 5%. Further, GST on Coal increased to 18% from 5% but compensation cess on GST has been removed.
- CERC initiated the process to amend the Deviation Settlement Mechanism Regulations 2024 to consider existing Wind & Solar projects at par with General Sellers from 1st April 2031 and all Wind & Solar projects (with tendering or bid submission dates on or after 1st April 2026) at par with General Sellers.

[All data was last accessed on 24th October 2025]



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B-28, Qutab Institutional Area, New Delhi 110016

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