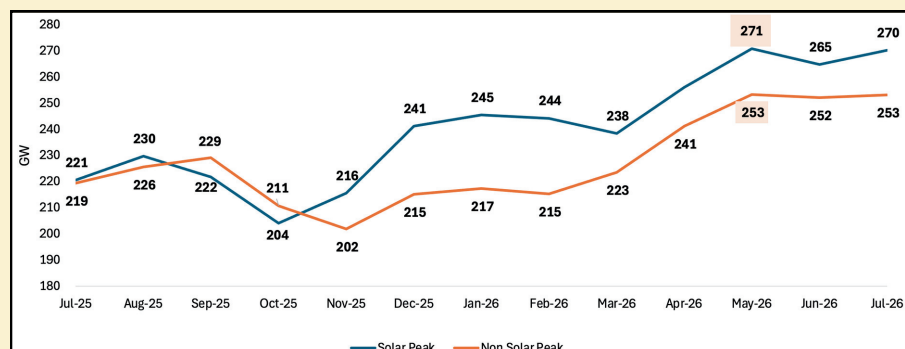


MONTHLY SNAPSHOT

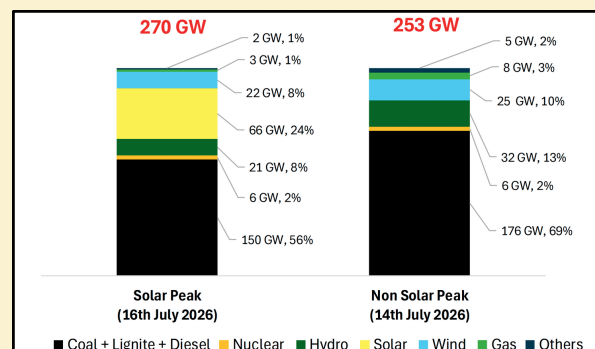
INDIA POWER SECTOR: JULY 2026

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (270 GW) on 16th July 2026 @14:55 hrs
2) Non Solar Peak (253 GW) on 14th July 2026 @22:28 hrs
Source: Grid India

FIGURE 2: SOURCE-WISE CONTRIBUTION IN PEAK DEMAND [EFFECTIVE CAPACITIES]



Note: Contribution mix at the maximum peak in June 2026 with Solar Peak (270 GW) on 16th July 2026 @14:55 hrs and Non Solar Peak (253 GW) on 14th July 2026 @22:28 hrs

Table 1: INSTALLED CAPACITY (GW)

Source		2030 Target	Jul-26	Under Construction	Under Planning*
Fossil Sources		277	251	48	16
Thermal	Coal & Lignite	252	251	48	16
	Diesel & Gas	25			
Non-Fossil Sources		482	301	146	93
Nuclear		15	9	8	6
Hydro	Large^	54	52	13	20
	Small	5	5		
Solar	Ground Mounted Solar	293	123	93	44
	Solar Rooftop		31		
	Hybrid Solar		5		
	Off-grid Solar/KUSUM		7		
Wind		100	58	32	10
Other		15	12		13
Total		759	552	194	109
Pumped Storage Plants		19	7	16	7
Battery Energy Storage System (GW/GWh)		41.65/208.25	2.93/8.66	15.75/42.53	30.94/105.99

*Data extracted from Reply by MoP to Lok Sabha Unstarred Question No. 1745 dated 03/08/26;

^ Large Hydro includes Pumped Storage Plants.

Under Planning and Under Construction Data is updated as of 6/08/26

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		Jul-26	Y-o-Y Growth
Thermal		119	12% ↑
Nuclear		5	19% ↑
Hydro	Large	18	-18% ↓
	Small	0.6	-65% ↓
Solar		16	34% ↑
Wind		19	6% ↑
Other (Biomass, Bagasse)		0.5	-65% ↓
Total		178	7.8% ↑

Source: Central Electricity Authority

Note: 1) Generation through Renewable Energy sources is prepared from Cumulative Daily generation reports of July 2026 which does not capture SHP separately. Hence, SHP generation has been provisionally kept in the same ratio as of 'SHP: Others' as per July 2025.

2) Monthly Generation for Thermal, Hydro and Nuclear taken from NPP Monthly Report (TENTATIVE).

Table 3: TRANSMISSION INFRASTRUCTURE

Parameter	NEP Target (2032)	Jun-26	Under Construction*	Under Planning^
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)	648	510	62	77
ISTS	295	222	29	43
InSTS	354	287	33	33
Transformation capacity ('000 MVA)	2,412	1478	404	530
ISTS	1,281	646	288	348
InSTS	1,131	832	116	182
Inter-regional Trans. Capacity (GW)	168	120		

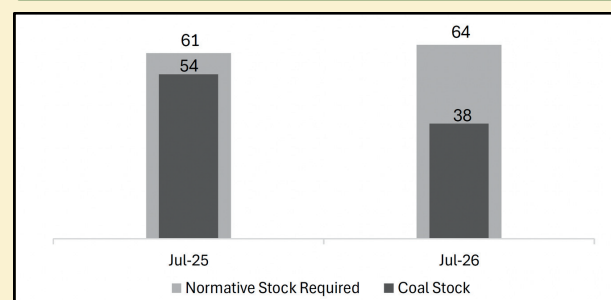
*Considering capacity to be added during FY 2027-32 as under planning stage;

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

Note: Latest available data as on 17/07/26

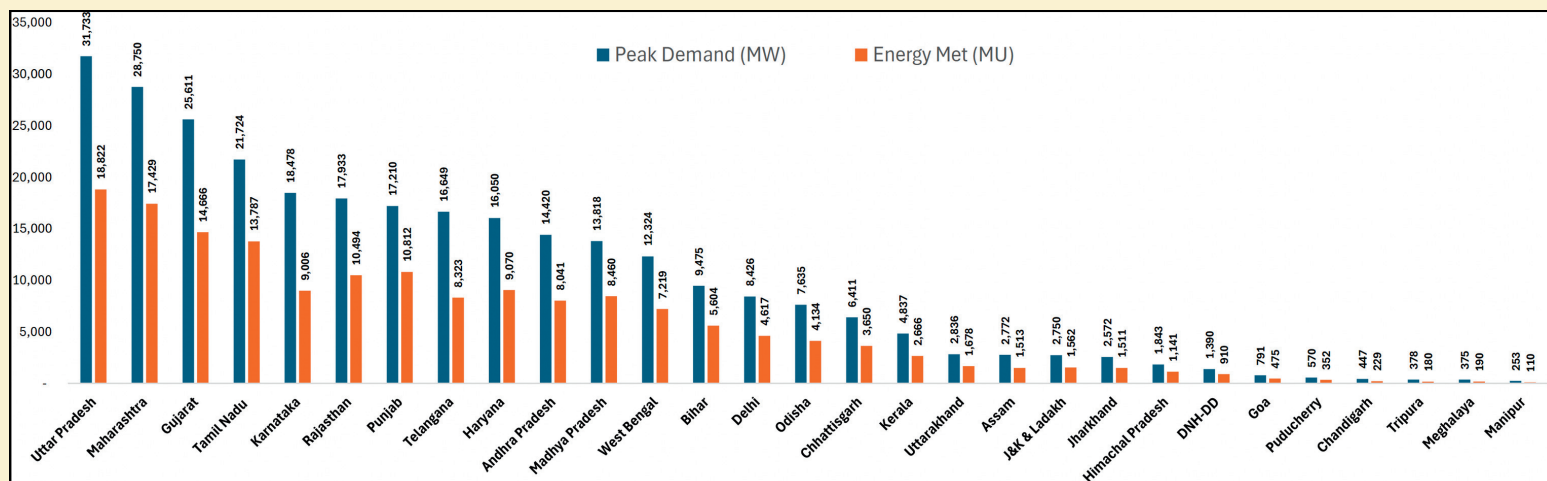
Source: NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

Figure 4: STATE-WISE PEAK DEMAND (MW) & ENERGY MET (MU) IN JULY 2026



Source: GRID India (Daily PSP Report)

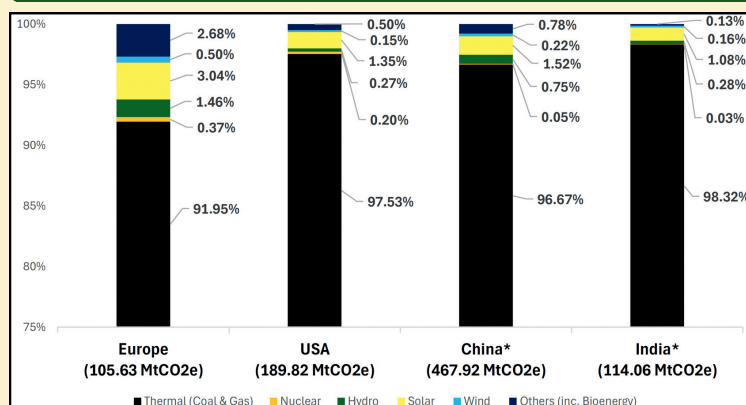
Table 4: MONTHLY GENERATION OF MAJOR ECONOMIES- JULY 2026

Countries	Europe	USA	China	India
Thermal	138	284	484	119
Nuclear	75	71	43	5
Hydro	64	21	146	18
Solar	67	53	148	16
Wind	43	32	78	19
Others	15	5	16	0.54
Total (BU)	402	467	915	178

Source: Ember Energy Data (2026)

*Data for China is as per June 2026.

Figure 5: SHARE OF EMISSIONS IN ELECTRICITY (%) OF MAJOR ECONOMIES - JULY 2026



Source: Ember Energy Data (2026)

Note: Electricity emissions are reported on a full lifecycle basis, in MtCO_{2e}. *Data for India is as per May 2026 and China is as per June 2026.

KEY HIGHLIGHTS

- 30 SERCs have issued Tariff Orders for True-up of FY 2024-25 and ARR of FY 2026-27 (till 31/07/2026):
 - PSERC, HPERC & MERC have announced reduced Tariff for all consumer categories
 - BERC has announced reduction in tariff of Domestic & Non-Domestic consumer category only
 - Tariff hike of 4.80% is announced by MPERC, 6.12% by JSERC, 5.05% by MNER, 6.23% by CSERC, 14% by SSERC and by TERC
 - AERC, APERC, HERC, OERC, GERC, MZERC, MSERC, UERC, TGERC, RERC, APSERC & UPERC have announced no change in Tariff
 - KERC issued True-up. KERC, MERC and JERC (Goa & UTs) have issued MYT Orders which include Tariffs for FY 2026-27
- CERC vide its Order dated 10/07/2026 has introduced a regulatory framework to optimise the utilisation of transmission infrastructure which was blocked due to unsigned PPAs. CERC provided four options: continue with the connectivity by exiting the LoA route upon furnishing a Performance Bank Guarantee, substitute the original LoA with a PPA secured under another LoA, voluntarily surrender full or partial connectivity, and continue under the existing provisions of the GNA Regulations.
- CERC has issued the Draft CERC (Sharing of Inter-State Transmission Charges and Losses) (Fifth Amendment) Regulations, 2026, focusing on- Transmission Charge Waiver for RE Projects delayed due to ISTS unavailability, Extension of ISTS Waivers to Co-located BESS, Separate Treatment of BESS Charging, Recognition of GDAM Procurement for Renewable Requirement, Framework for Dual Connectivity, One-time Option for Applicable Waiver Mechanism and others.

[All data was last accessed on 6th August 2026]



POWER FOUNDATION OF INDIA

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