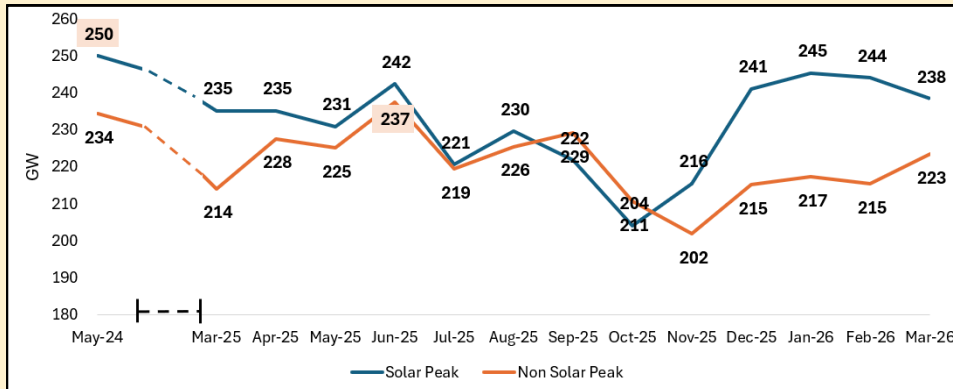


# MONTHLY SNAPSHOT

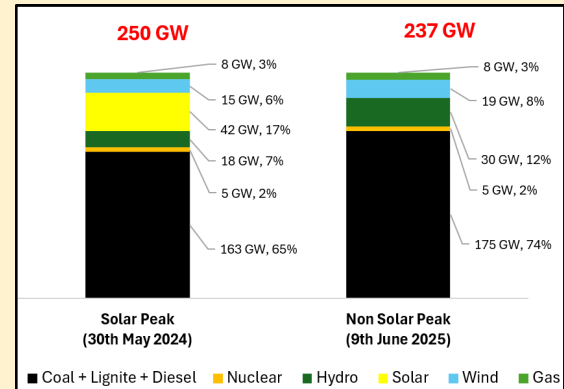
## INDIA POWER SECTOR: MARCH 2026

**Figure 1: PEAK DEMAND MONTHLY TREND**



**Note:** 1) Solar Peak (238 GW) on 7th March 2026 @10:15 hrs  
 2) Non Solar Peak (223 GW) on 10th March 2026 @18:58 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	Mar-26	Y-o-Y Growth
<b>Fossil Sources</b>	<b>277</b>	<b>47</b>	<b>39</b>	<b>249</b>	<b>1%</b>
Thermal					
Coal & Lignite	252	47	39	229	3%
Diesel & Gas	25			21	-18%
<b>Non-Fossil Sources</b>	<b>482</b>	<b>92</b>	<b>139</b>	<b>283</b>	<b>24%</b>
Nuclear	15	7	7	9	7%
Hydro					
Large^	54	20	13	51	8%
Small	5			5	1%
Solar					
Ground Mounted Solar	293	35	90	115	42%
Solar Rooftop				26	51%
Hybrid Solar				4	34%
Off-grid Solar/KUSUM				6	22%
Wind	100	15	29	56	12%
Other	15	15		12	1%
<b>Total</b>	<b>759</b>	<b>139</b>	<b>178</b>	<b>533</b>	<b>12%</b>
Pumped Storage Plants	19	7	16	7	56%
Battery Energy Storage System (GW/GWh)	41.65/208.25	19.80/61.01	9.65/26.73	-	-

**Note:** \*Data extracted from Reply by MoP to Lok Sabha Unstarred Question No. 4425 dated 19/03/2026;  
 ^ 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	Mar-26	Y-o-Y Growth
Thermal	120	-2.0% ↓
Nuclear	5	8% ↑
Hydro		
Large	10	8% ↑
Small	0.2	-66% ↓
Solar	18	8% ↑
Wind	5	-6% ↓
Other (Biomass, Bagasse)	0.5	-66% ↓
<b>Total</b>	<b>158</b>	<b>-1.1% ↓</b>

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

**Source:** Central Electricity Authority

**Table 3: TRANSMISSION INFRASTRUCTURE**

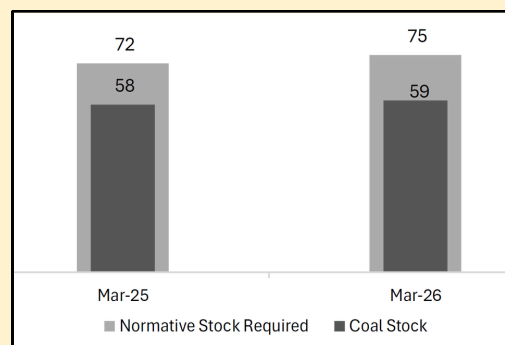
Parameter	NEP Target (2032)	Under Planning <sup>^</sup>	Under Construction*	Mar-26	Y-o-Y Growth
<b>Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)</b>	<b>648</b>	<b>77</b>	<b>65</b>	<b>507</b>	<b>2%</b>
ISTS	295	43	31	220	3%
InSTS	354	33	34	286	2%
<b>Transformation capacity ('000 MVA)</b>	<b>2,412</b>	<b>530</b>	<b>431</b>	<b>1451</b>	<b>8%</b>
ISTS	1,281	348	304	629	13%
InSTS	1,131	182	127	822	5%
<b>Inter-regional Trans. Capacity (GW)</b>	<b>168</b>			<b>120</b>	<b>1%</b>

**Note:** <sup>^</sup>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

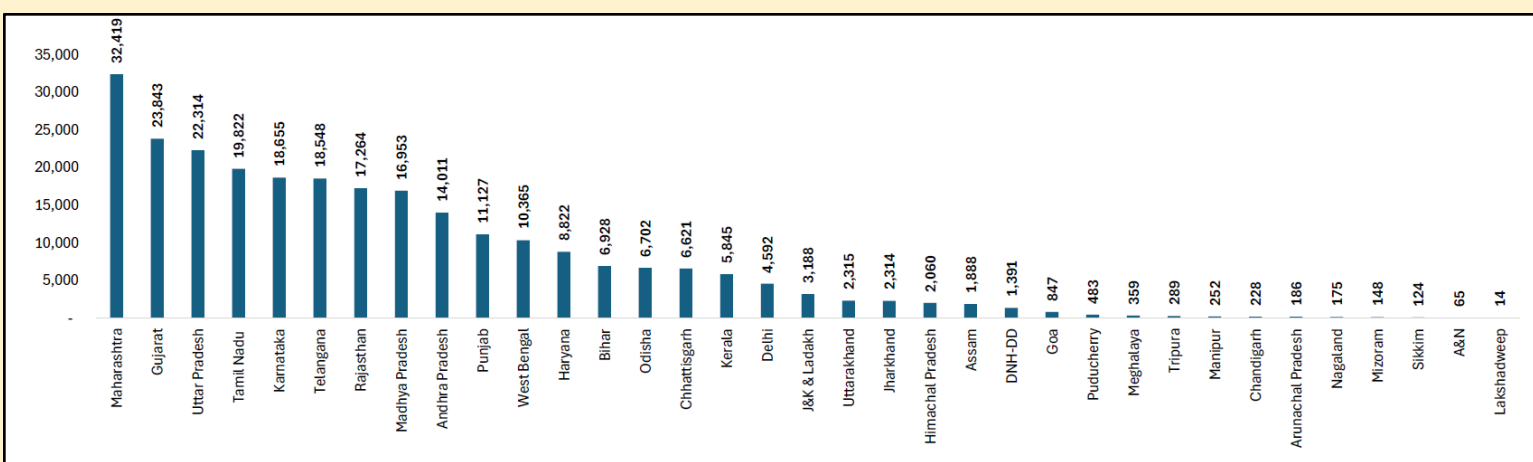
**Source:** NEP: National Electricity Plan (Volume II) Transmission; Central Electricity Authority

**Figure 3: COAL STOCK (million metric tonnes)**



**Source:** National Power Portal

**Figure 4: STATE-WISE PEAK DEMAND (MW) IN MARCH 2026**



**Source:** Central Electricity Authority

**KEY HIGHLIGHTS**

- Unit-5 (660 MW Thermal Power Plant) of WBPDC Sagardighi and Unit-1 (250 MW Hydro Power Plant) of NHPC Subansiri Lower HEP was added in the Indian Grid in the month of March 2026
- 18 SERCs have issued Tariff Orders for True-up of FY 2024-25 and ARR of FY 2026-27:
  - PERC, HERC, MERC & KERC (MESCOM, HESCOM & GESCOM) 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 and KERC (6.46% BESCOM & 1.63% CESC)
  - AERC, APERC, HERC, OERC, GERC, MZERC, MSERC, UERC, TGERC, RERC & APSERC have announced no change in Tariff
- CERC has determined the value of 'X' for computation of deviation (in percentage) for Wind and Solar (WS) Sellers under the CERC (Deviation Settlement Mechanism and Related Matters) Regulations, 2024. **WS Sellers will be at par with General Sellers from April 1, 2031.**

[All data was last accessed on 21<sup>st</sup> April 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.

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