India’s Energy Overview

February 2026

VASUDHA FOUNDATION
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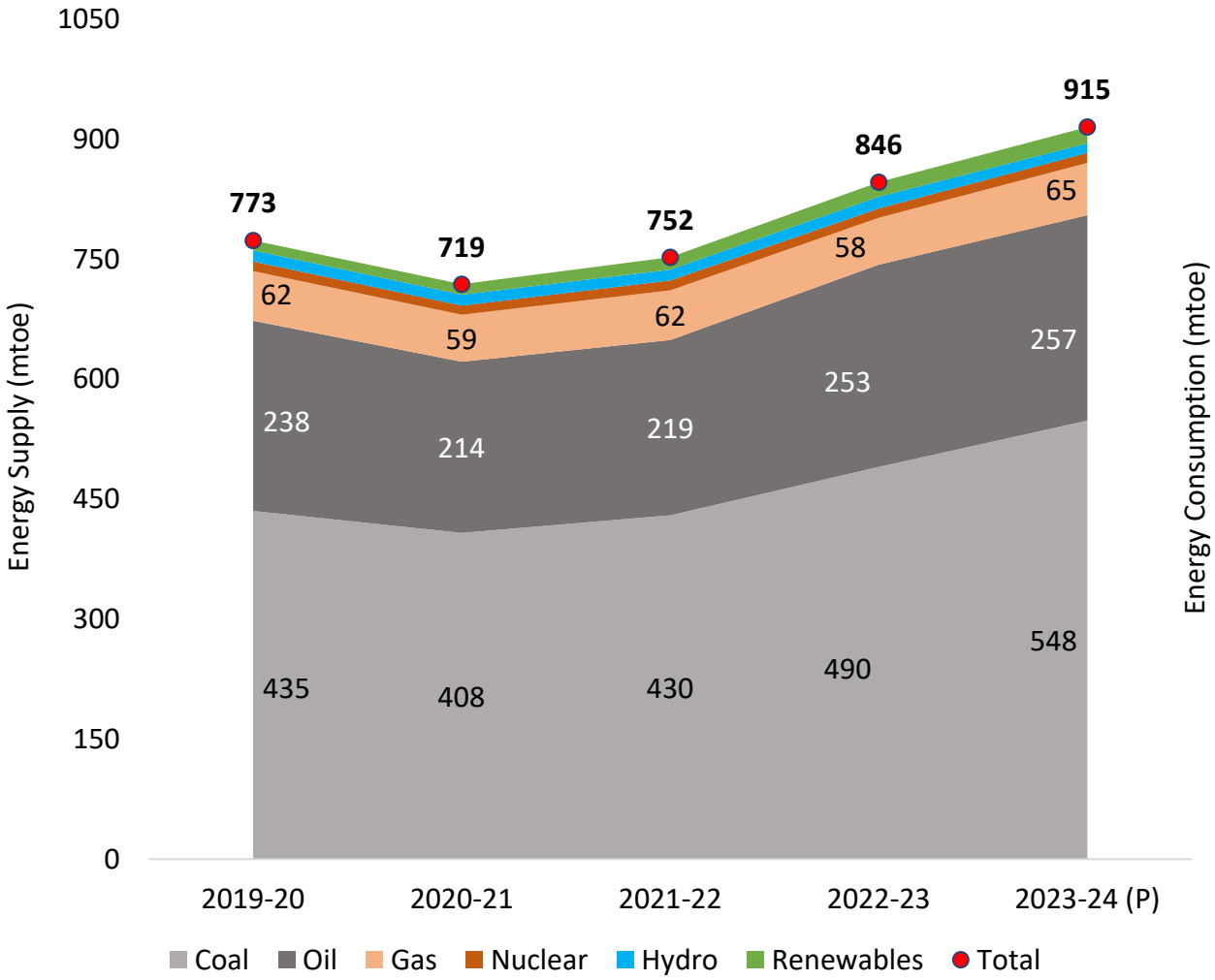
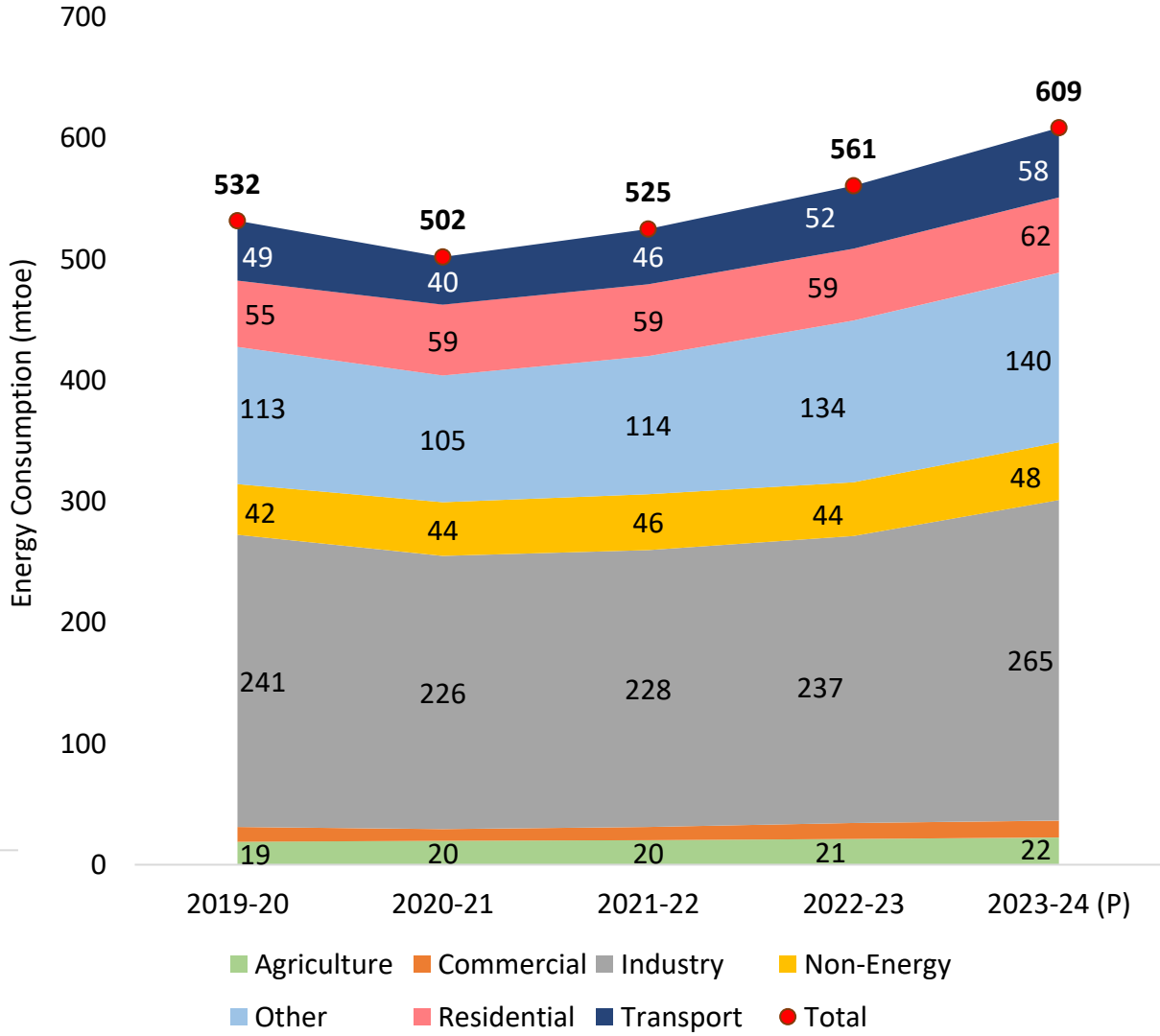
Contents

Primary* and Final Energy Mix in India

Source-wise Primary Energy Supply (mtoe)*



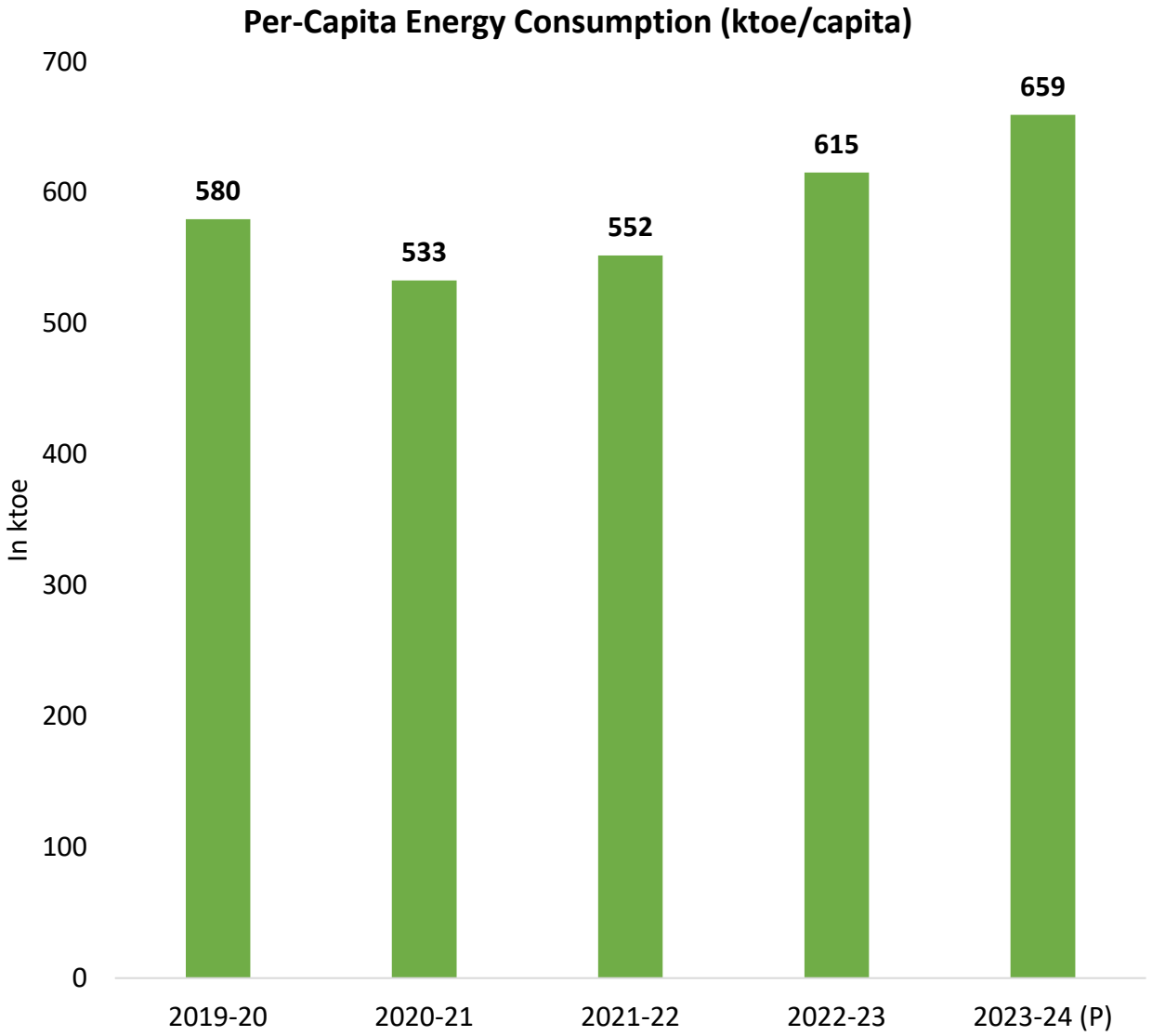
Sector-wise Energy Consumption (mtoe)

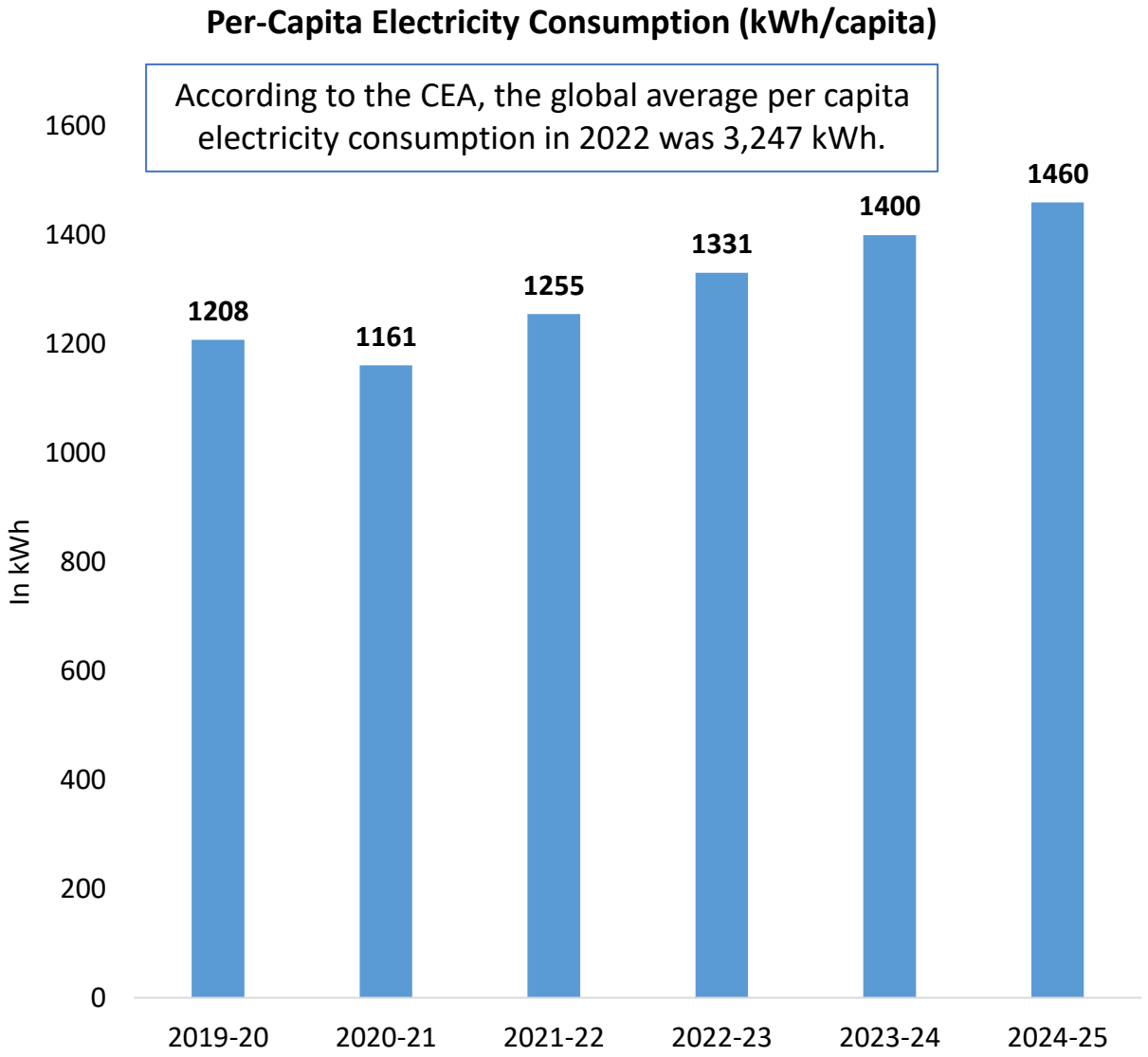


*Excluding biofuels, waste, and other non-commercial source of energy

Source: ICED

Per-Capita Energy and Electricity Consumption

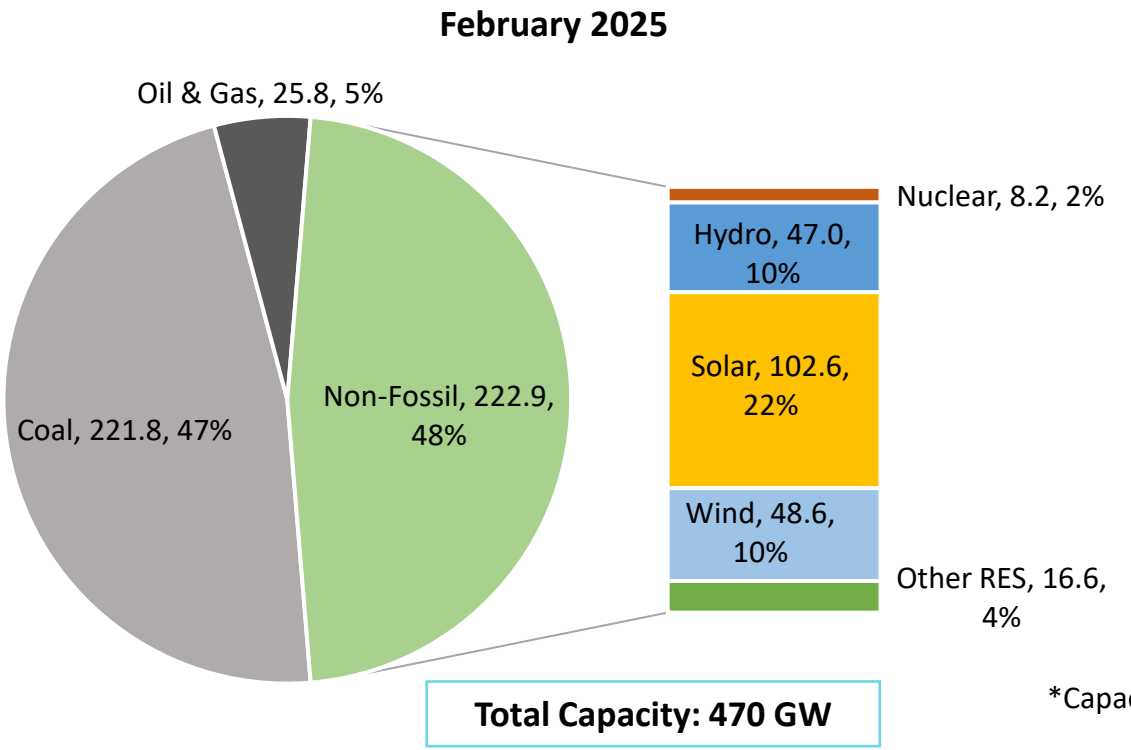


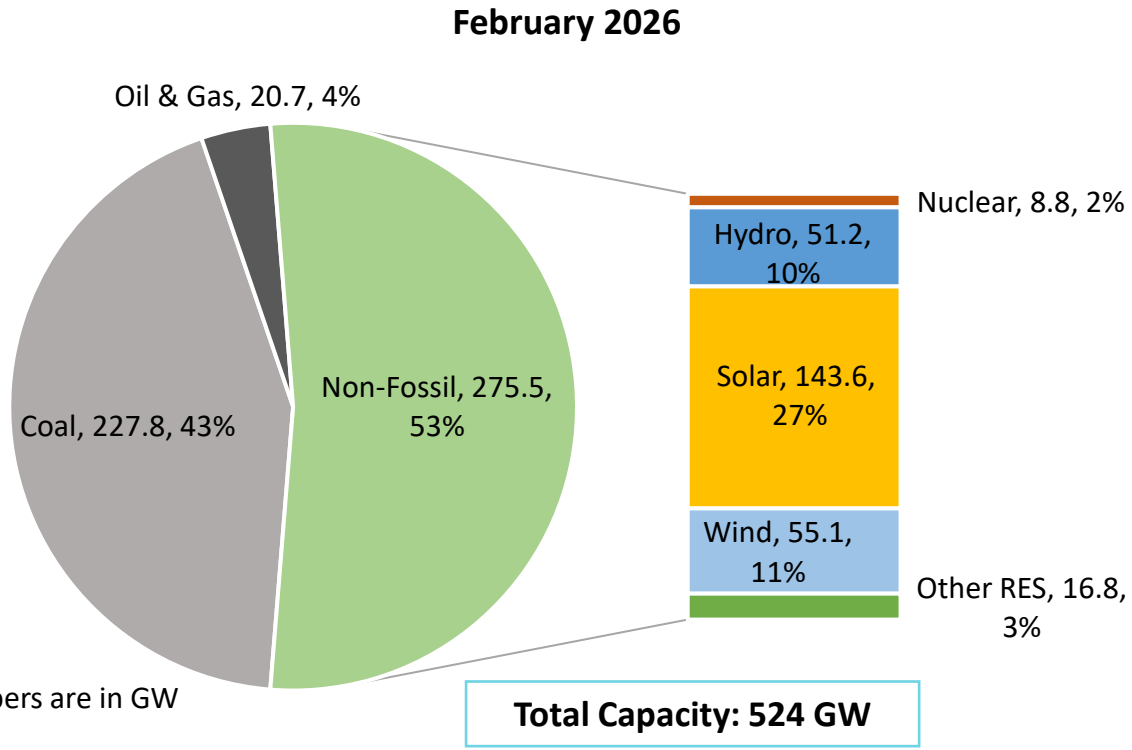


Note: Per Capita energy consumption is calculated on energy supply basis.

Source: ICED & CEA

India’s Electricity Capacity Mix (Utility-scale)



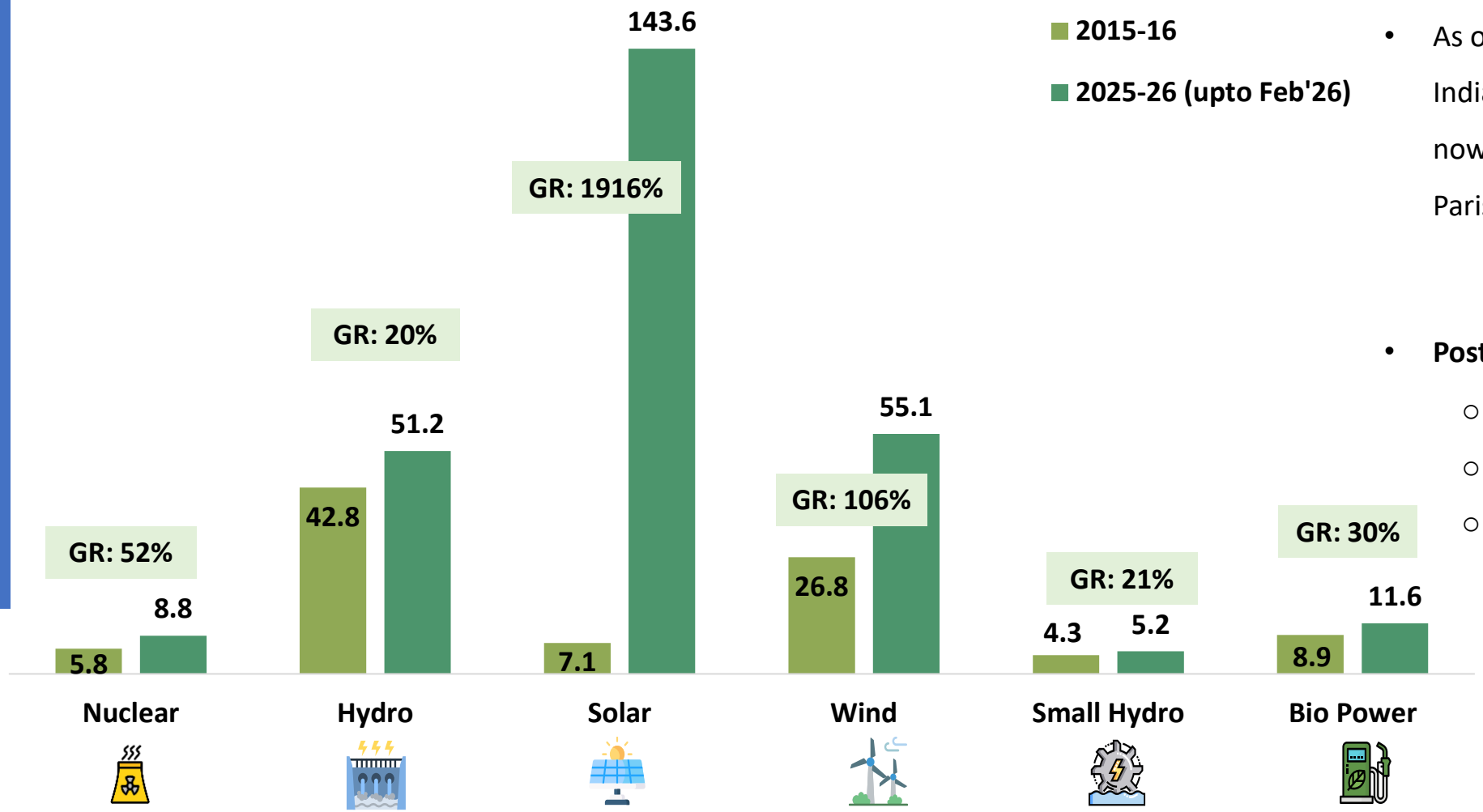


*Capacity Numbers are in GW

- India’s electricity generating capacity is 524 GW as on Feb’2026 [coal 228 GW (43%), solar 144 GW (27%), wind 55 GW (11%), and hydro 51 (10%)].
- As on Feb’2026, India’s renewable energy capacity (including large hydro) stood at 267 GW out of 524 GW.
- India has updated its NDC target to achieve 60% non-fossil capacity by 2035, after meeting the earlier 50% target for 2030 five years ahead of schedule.

Source: CEA

Non-Fossil Energy Capacity (in GW) Growth Post-2015 Paris Agreement



- As of 28 February 2026, **53% (275 GW)** of India's total power capacity (**524 GW**) is now non-fossil fuel-based, meeting the Paris Agreement pledge.

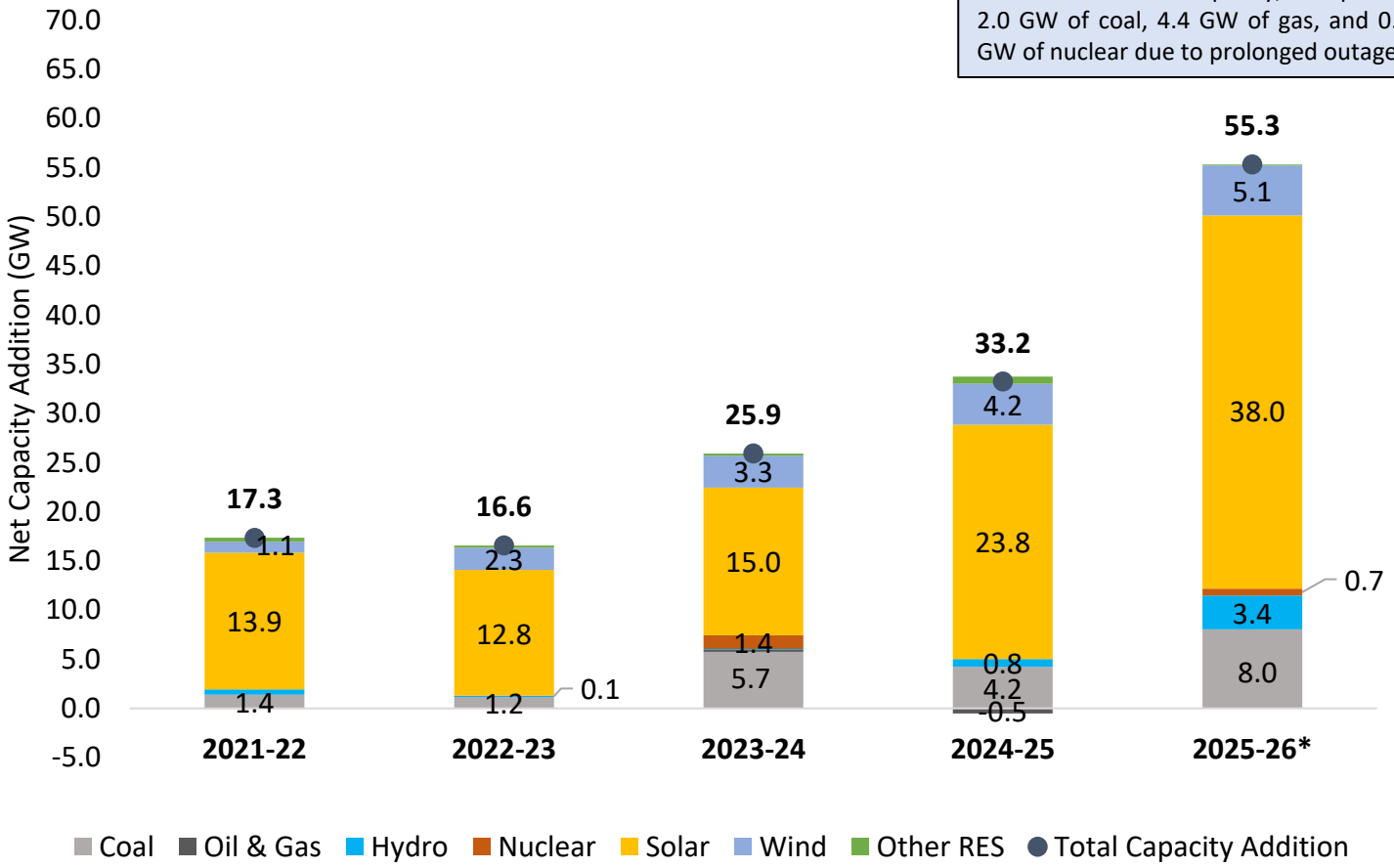
- **Post-2015 Paris Agreement Growth**:
  - solar capacity increased **20-folds**
  - wind power **doubled**
  - nuclear increased by **4% CAGR**.

Source: CEA & MNRE

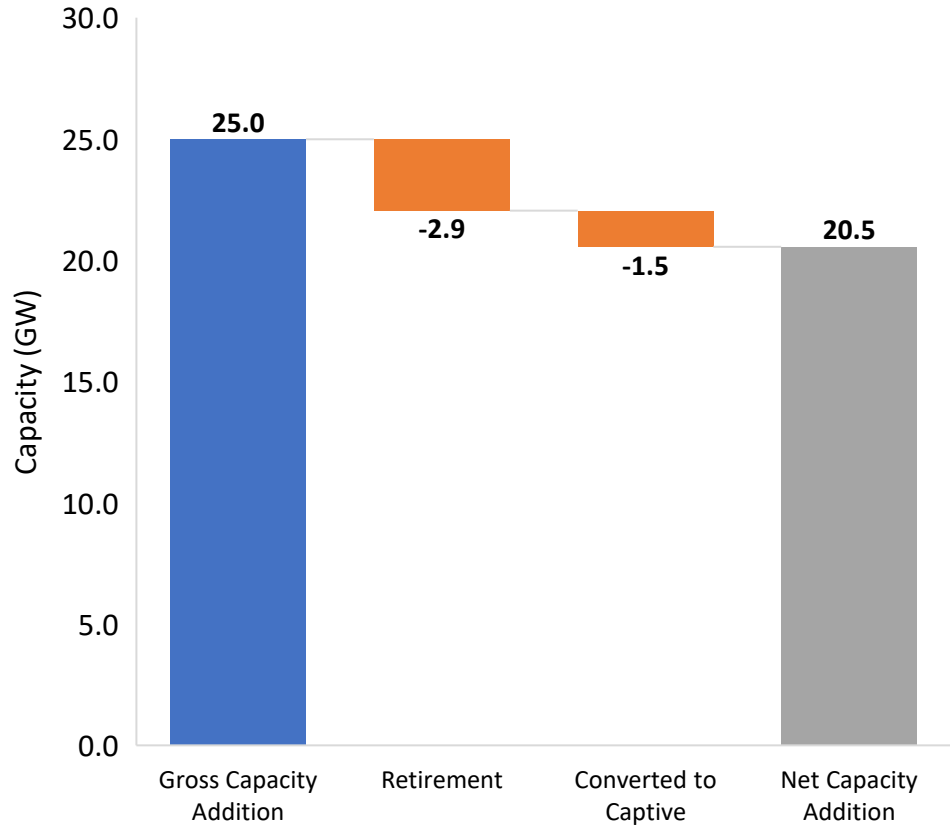
India’s Electricity Capacity Addition in last 5 years

Source-wise Net Capacity Addition (GW)

As of Jan’2026, the CEA has temporarily closed 6.5 GW of capacity, comprising 2.0 GW of coal, 4.4 GW of gas, and 0.1 GW of nuclear due to prolonged outage.



Net Coal Capacity Addition during 2021-22 to 2025-26*



- A total of 126 GW of generation capacity has been added in RE (Hydro, solar, wind, and other RES) over the past 5 years (2021-22 to 2025-26*), whereas the net coal capacity addition during the same period was 21 GW, mostly in the central sector.

NOTE: * The data for 2025-26 is up to February 2026.

Source: CEA & MNRE

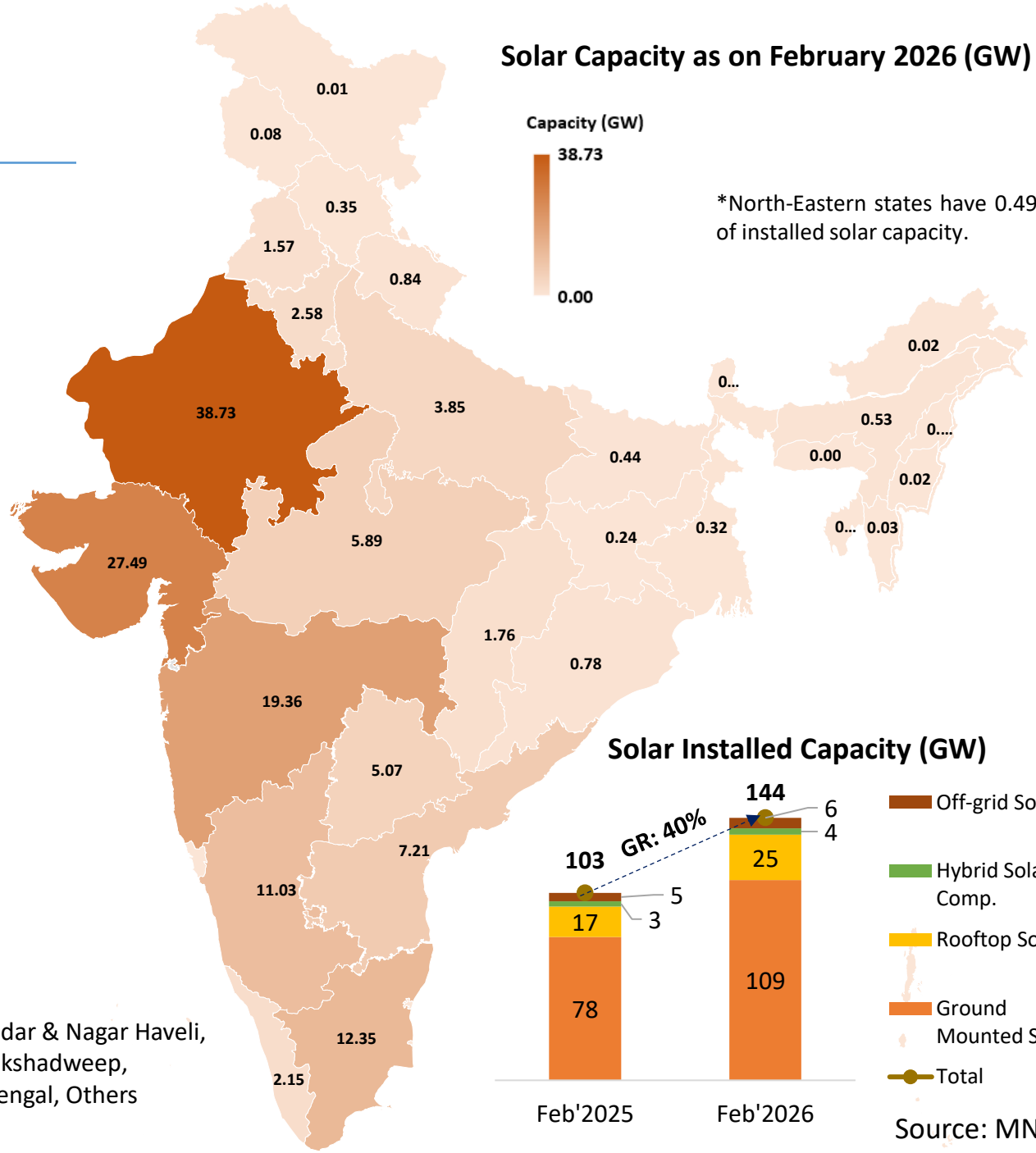
State-wise Solar Capacity

as on February 2026

State-wise Installed Capacity of Solar Power (GW)					
States	**Ground Mounted**	**Rooftop**	**Solar Component in Hybrid**	**Off Grid**	**Total Solar Power**
Rajasthan	**33.86**	2.07	**1.98**	0.82	**38.73**
Gujarat	19.47	**6.67**	1.17	0.17	27.49
Maharashtra	12.17	5.22	0.00	**1.97**	19.36
Tamil Nadu	10.94	1.34	0.00	0.07	12.35
Karnataka	9.79	0.84	0.36	0.04	11.03
Andhra Pradesh	6.35	0.77	0.00	0.09	7.21
Madhya Pradesh	4.94	0.85	0.00	0.10	5.89
Telangana	4.36	0.70	0.00	0.01	5.07
Uttar Pradesh	2.79	0.69	0.00	0.36	3.85
Haryana	0.27	1.16	0.00	1.15	2.58
Kerala	0.34	1.79	0.00	0.02	2.15
Chhattisgarh	1.20	0.17	0.00	0.39	1.76
Punjab	0.89	0.58	0.00	0.10	1.57
Uttarakhand	0.54	0.27	0.00	0.02	0.84
Others	1.60	1.74	0.00	0.40	3.73
All India	**109.50**	**24.87**	**3.51**	**5.73**	**143.60**

Others include- Andaman & Nicobar, Arunachal Pradesh, Assam, Bihar, Chandigarh, Dadar & Nagar Haveli, Daman & Diu, Delhi, Goa, Himachal Pradesh, Jammu & Kashmir, Jharkhand, Ladakh, Lakshadweep, Manipur, Meghalaya, Mizoram, Nagaland, Odisha, Puducherry, Sikkim, Tripura, West Bengal, Others

Solar Capacity as on February 2026 (GW)



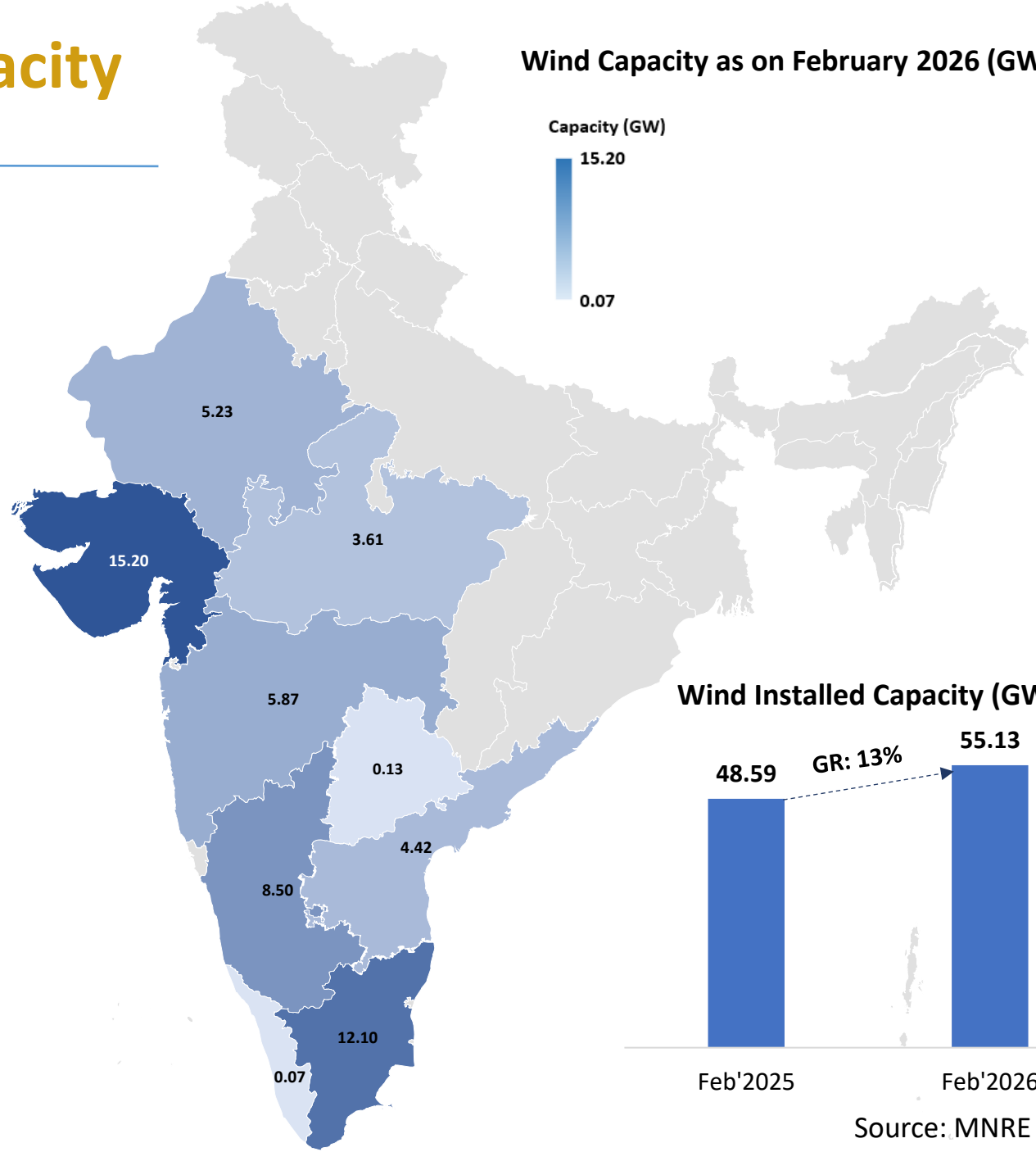
Solar Installed Capacity (GW)

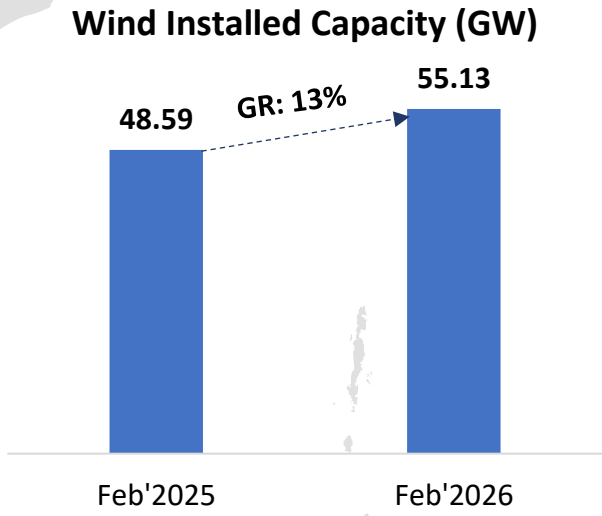
Source: MNRE

State-wise Wind Onshore Capacity

as on February 2026

State-wise installed capacity of Wind (Onshore) Power	
States	**Installed Capacity (GW)**
Gujarat	15.20
Tamil Nadu	12.10
Karnataka	8.50
Maharashtra	5.87
Rajasthan	5.23
Andhra Pradesh	4.42
Madhya Pradesh	3.61
Telangana	0.13
Kerala	0.07
India Total	**55.13**

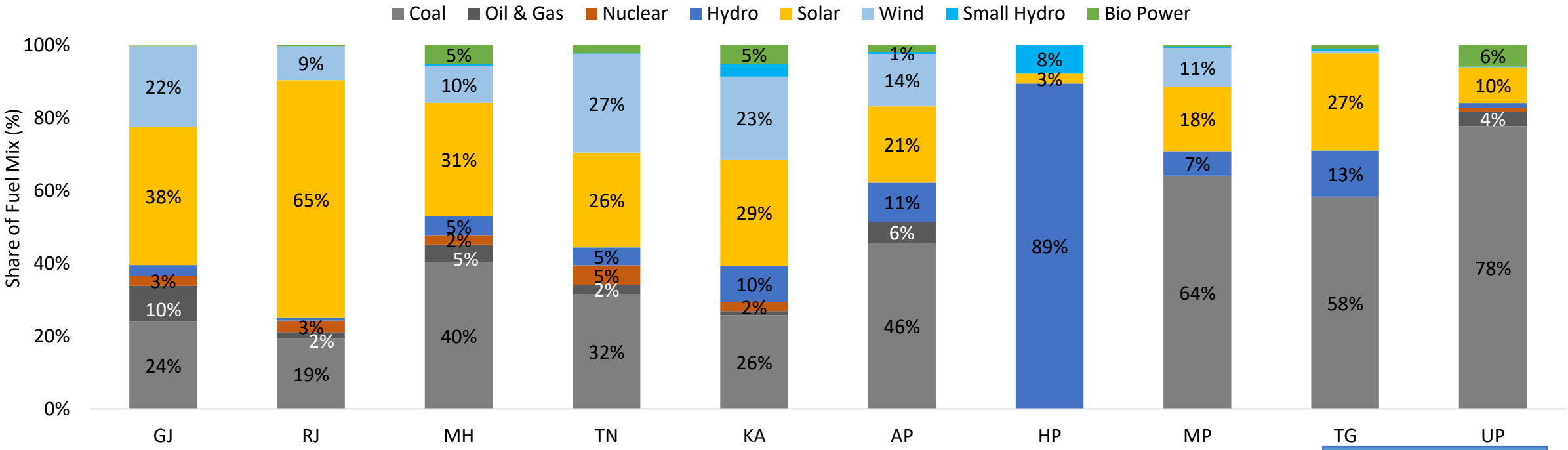




Source: MNRE

Top 10 High RE* States and Their Capacity Mix

as on February 2026



Numbers are in GW

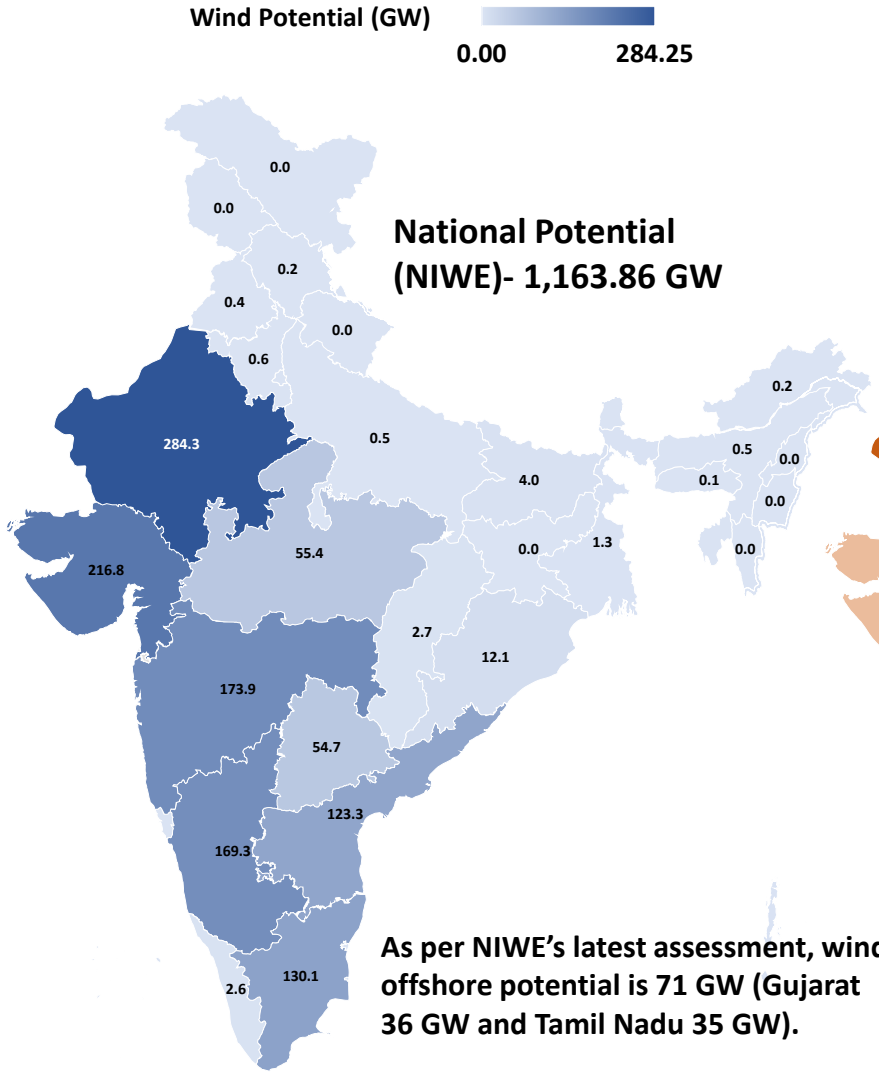
Parameters	GJ	RJ	MH	TN	KA	AP	HP	MP	TG	UP
Total Installed Capacity	69.43	58.23	59.20	46.29	37.18	31.34	12.79	33.19	19.75	38.66
Total RE Capacity	44.92	44.60	31.67	27.83	26.42	15.67	12.79	12.02	7.91	6.71
RE Share	65%	77%	53%	60%	71%	50%	100%	36%	40%	17%

NOTE: *Renewable Energy including Large Hydro

Source: MNRE & NPP

Renewable Energy (RE) Potential

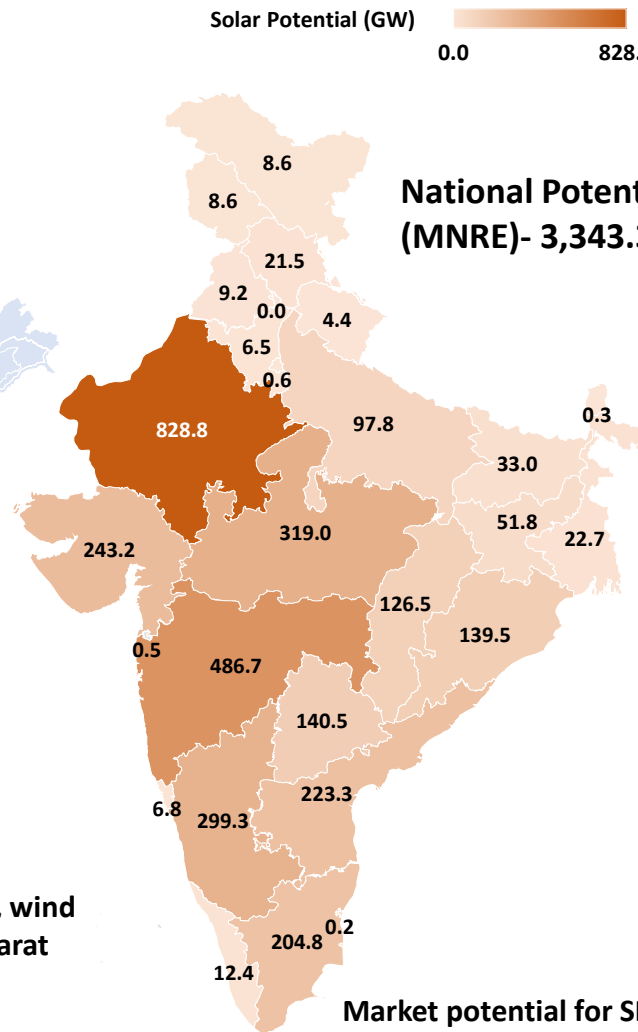
Wind Onshore (at 150m agl) and Offshore Potential



National Potential (NIWE)- 1,163.86 GW

As per NIWE's latest assessment, wind offshore potential is 71 GW (Gujarat 36 GW and Tamil Nadu 35 GW).

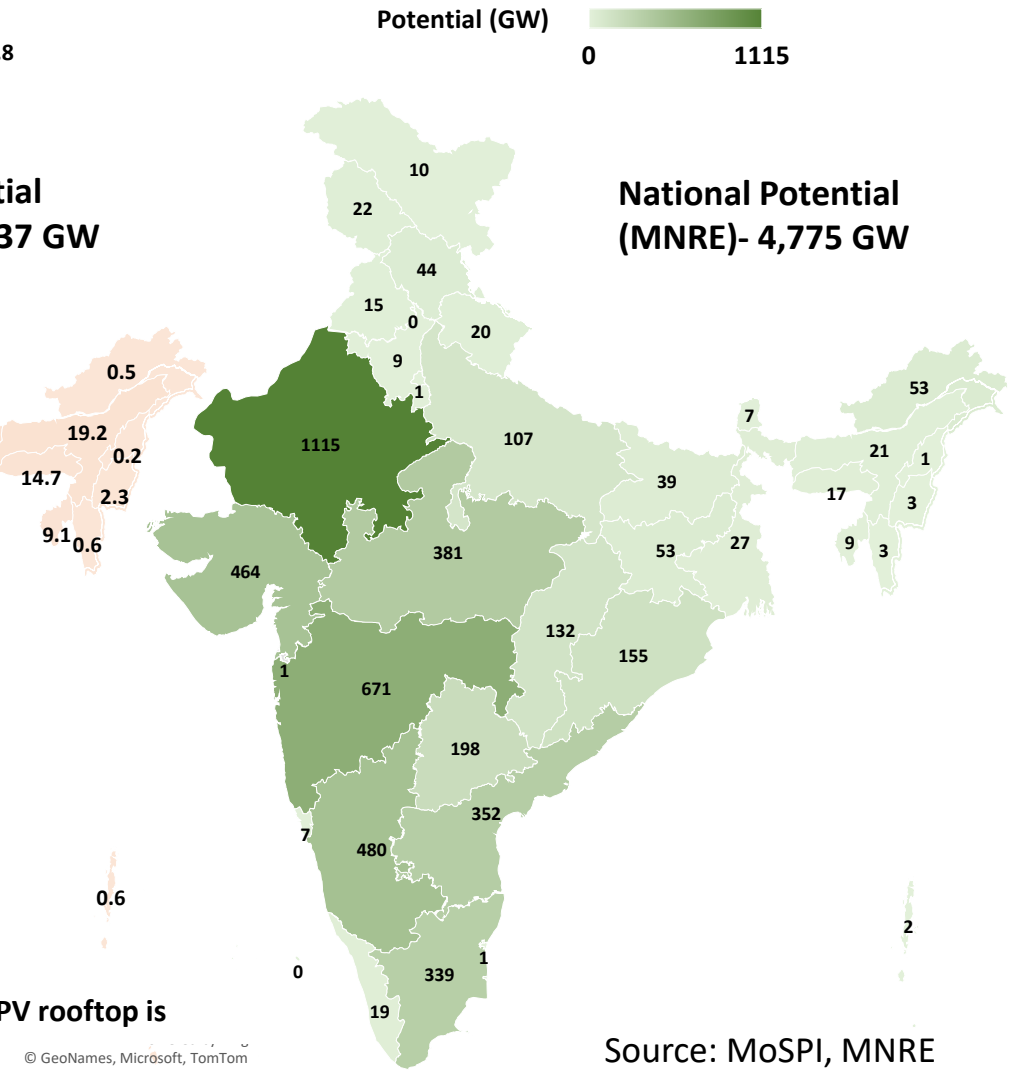
Solar Ground Mounted Potential (at 6.69% wasteland)



National Potential (MNRE)- 3,343.37 GW

Market potential for SPV rooftop is 124 GW.

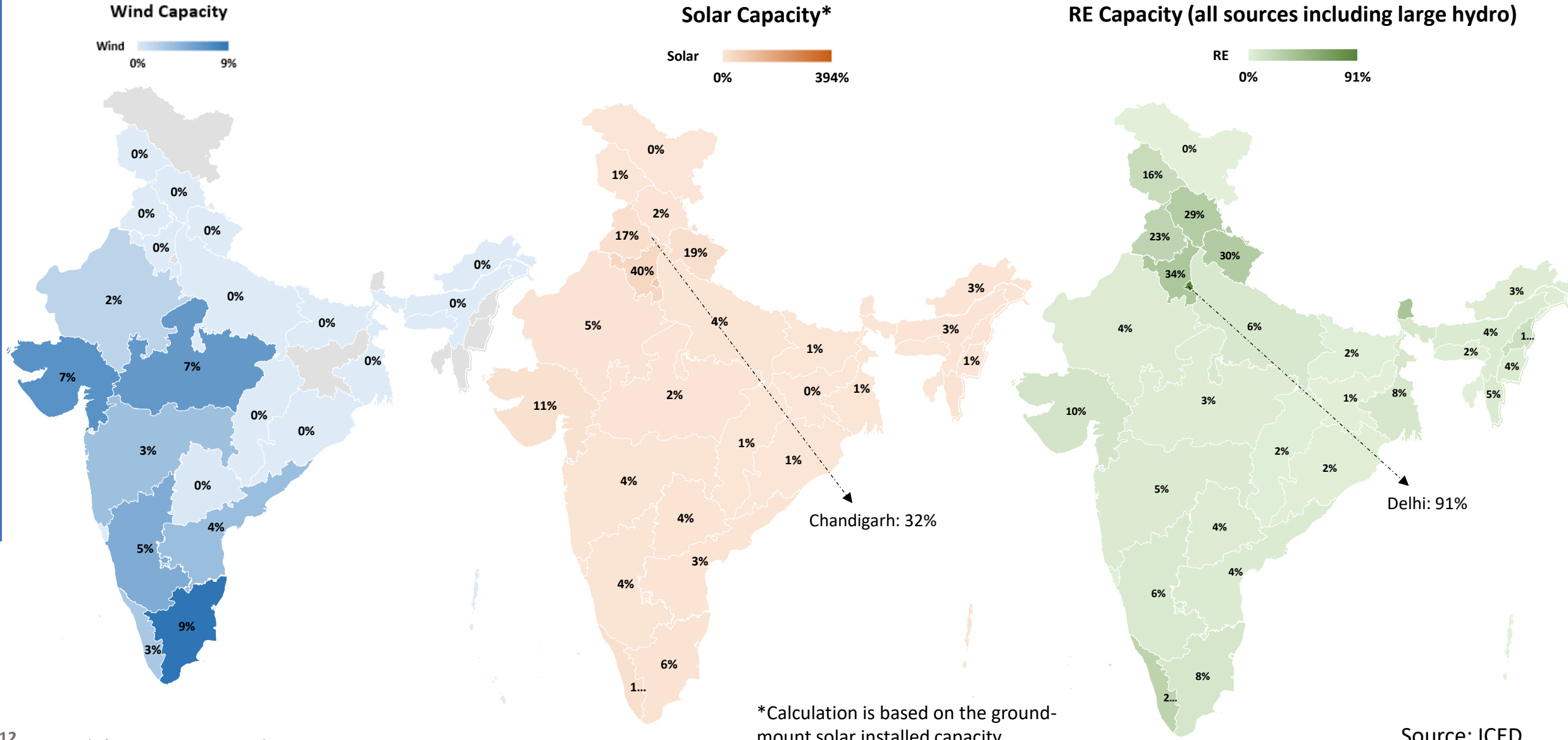
Renewable Energy Potential (all sources incl. large Hydro)



National Potential (MNRE)- 4,775 GW

Source: MoSPI, MNRE

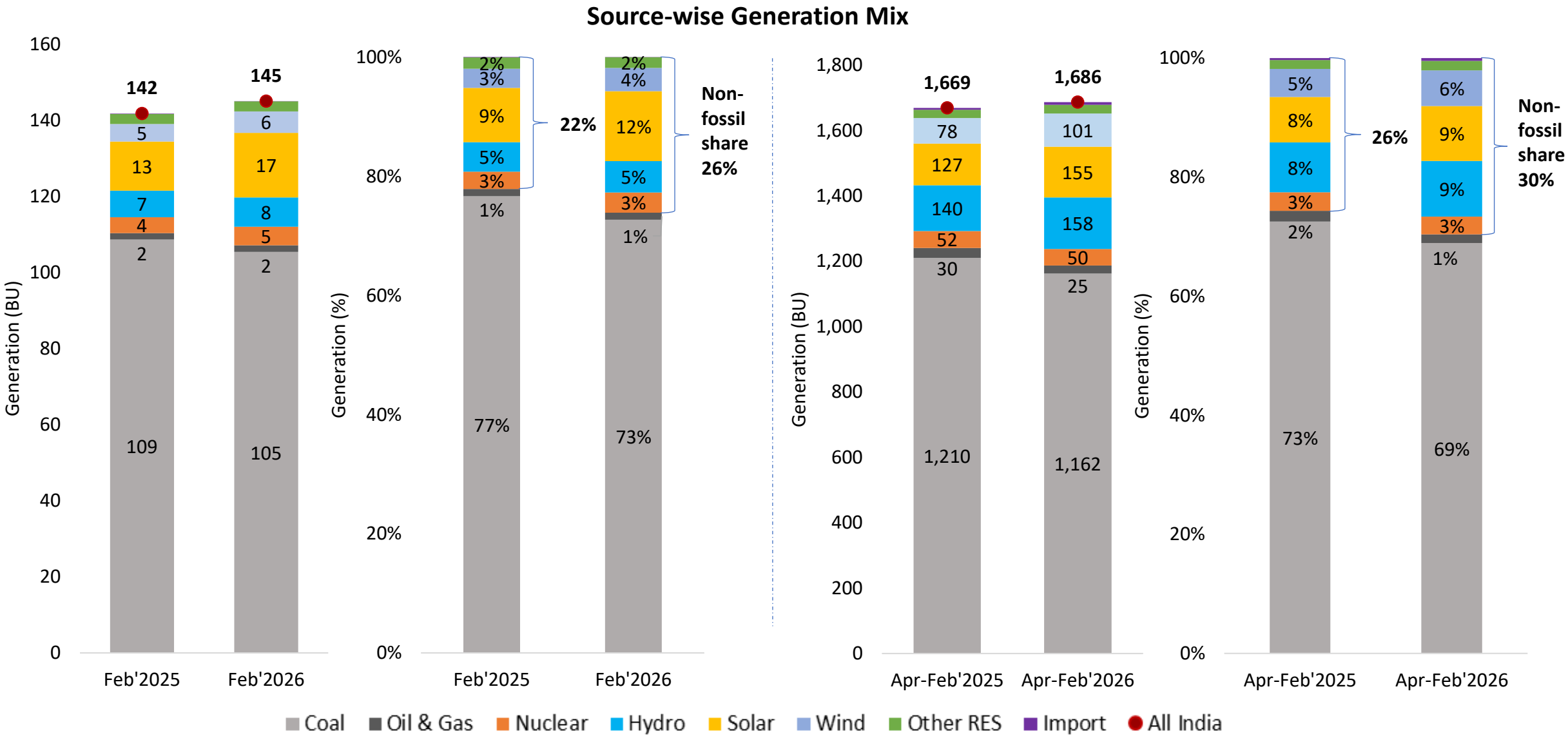
RE Installed capacity as a Percentage of the total resource potential in the state as on February 2026



*Calculation is based on the ground-mount solar installed capacity.

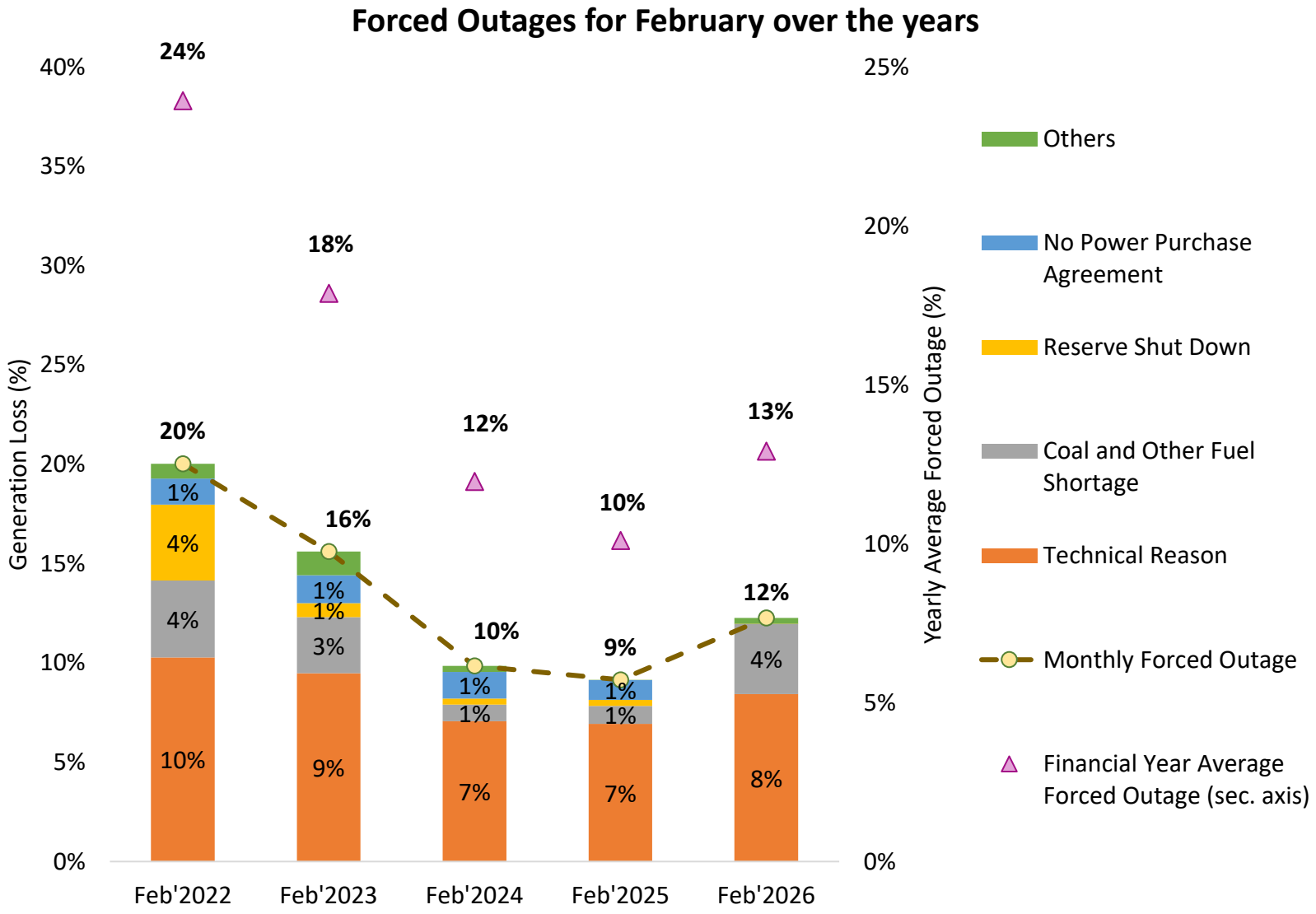
Source: ICED

India’s Electricity Generation Mix



Source: CEA

Thermal Generation Loss and Reasons for Forced Outages

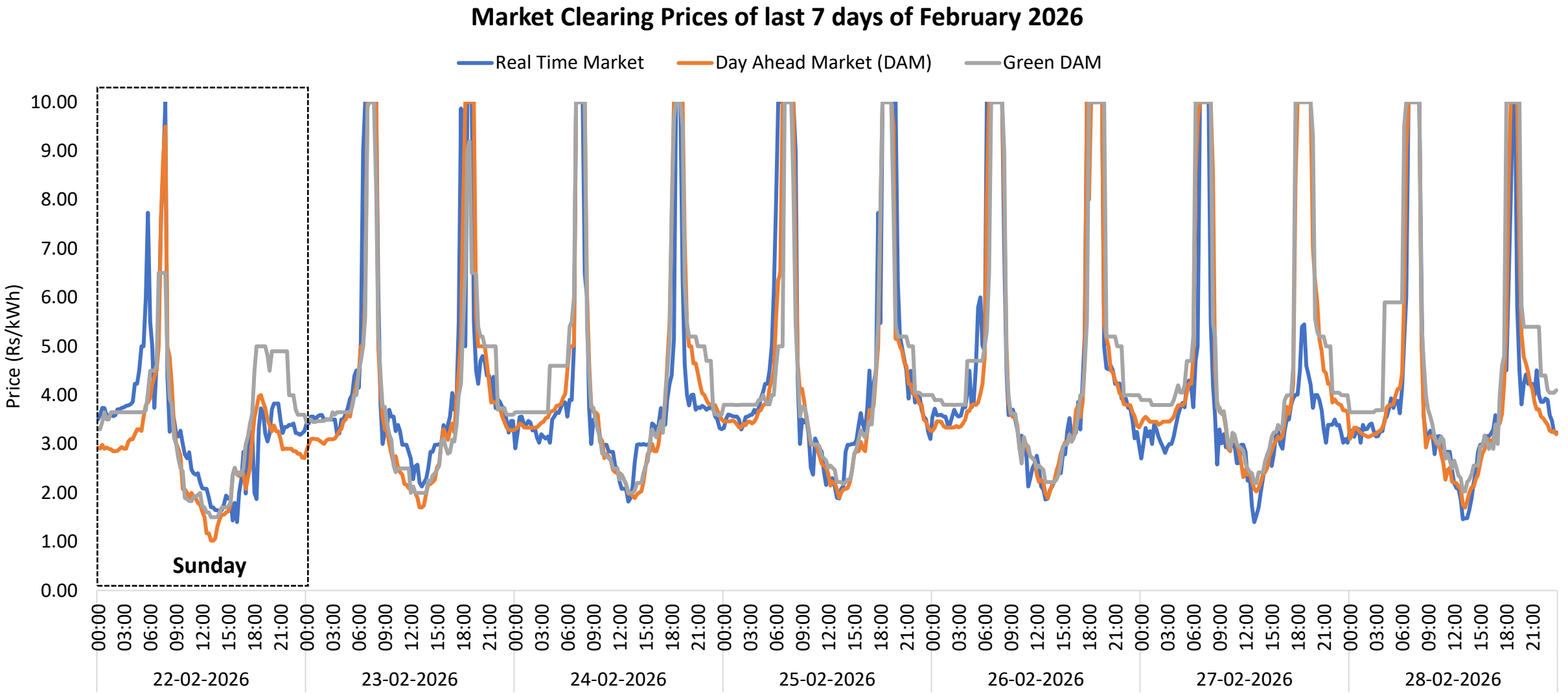


Year/ Month		Average Forced Outage Share
Yearly	FY 2023-24	12%
	FY 2024-25	10%
	FY 2025-26 (up to Feb'26)	13%
Monthly	Feb'2024	10%
	Feb'2025	9%
	Feb'2026	12%

Thermal includes only Coal and Lignite Plants.

Source: ICED

Indian Electricity Exchange (IEX) Market Snapshot

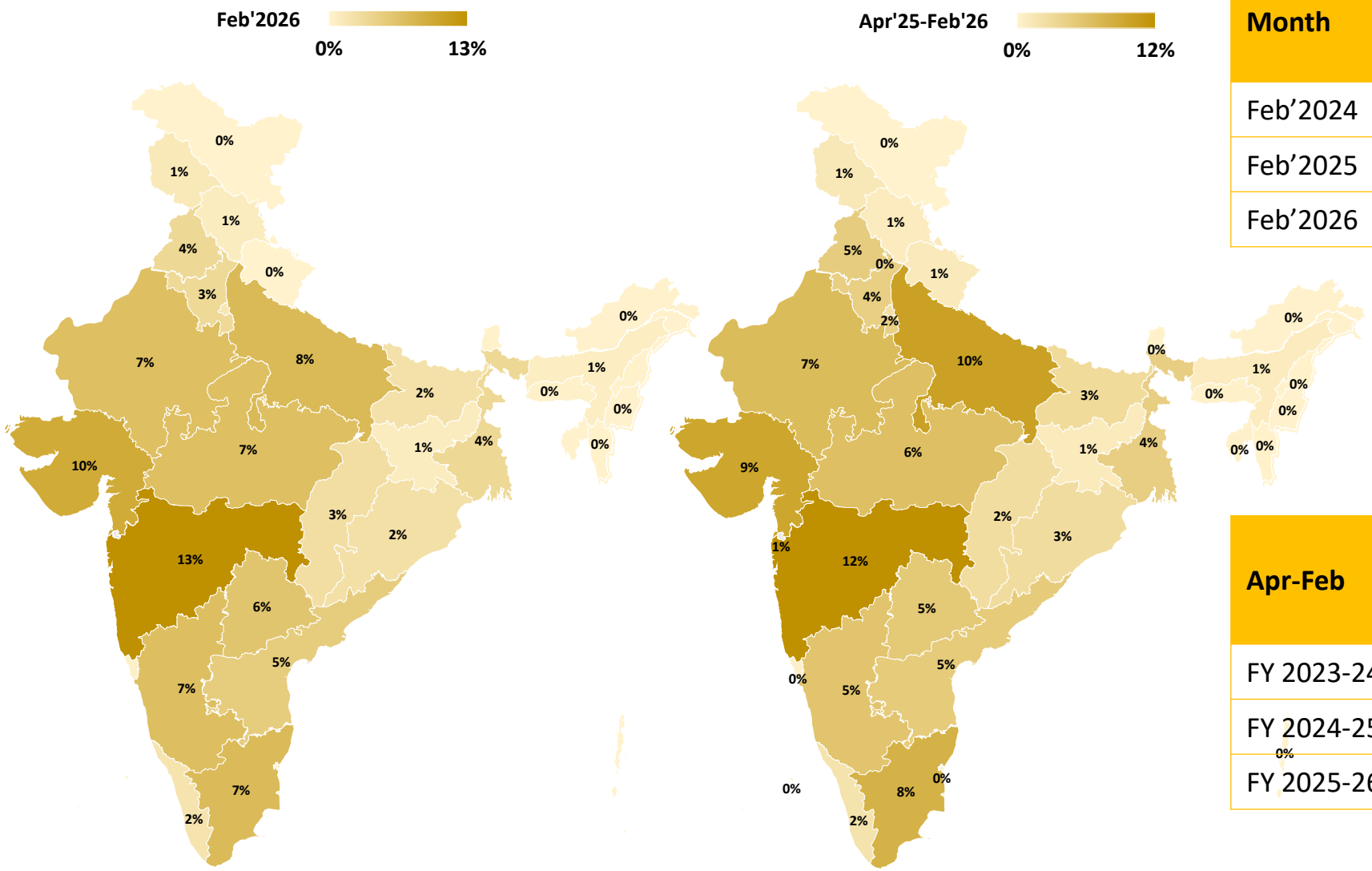


In April 2023, CERC revised the price ceiling from ₹12/kWh to ₹10/kWh in the power exchange market.

Source: IEX

National and State level Electricity Demand

State-level Electricity Demand as a percent of National Demand (%)



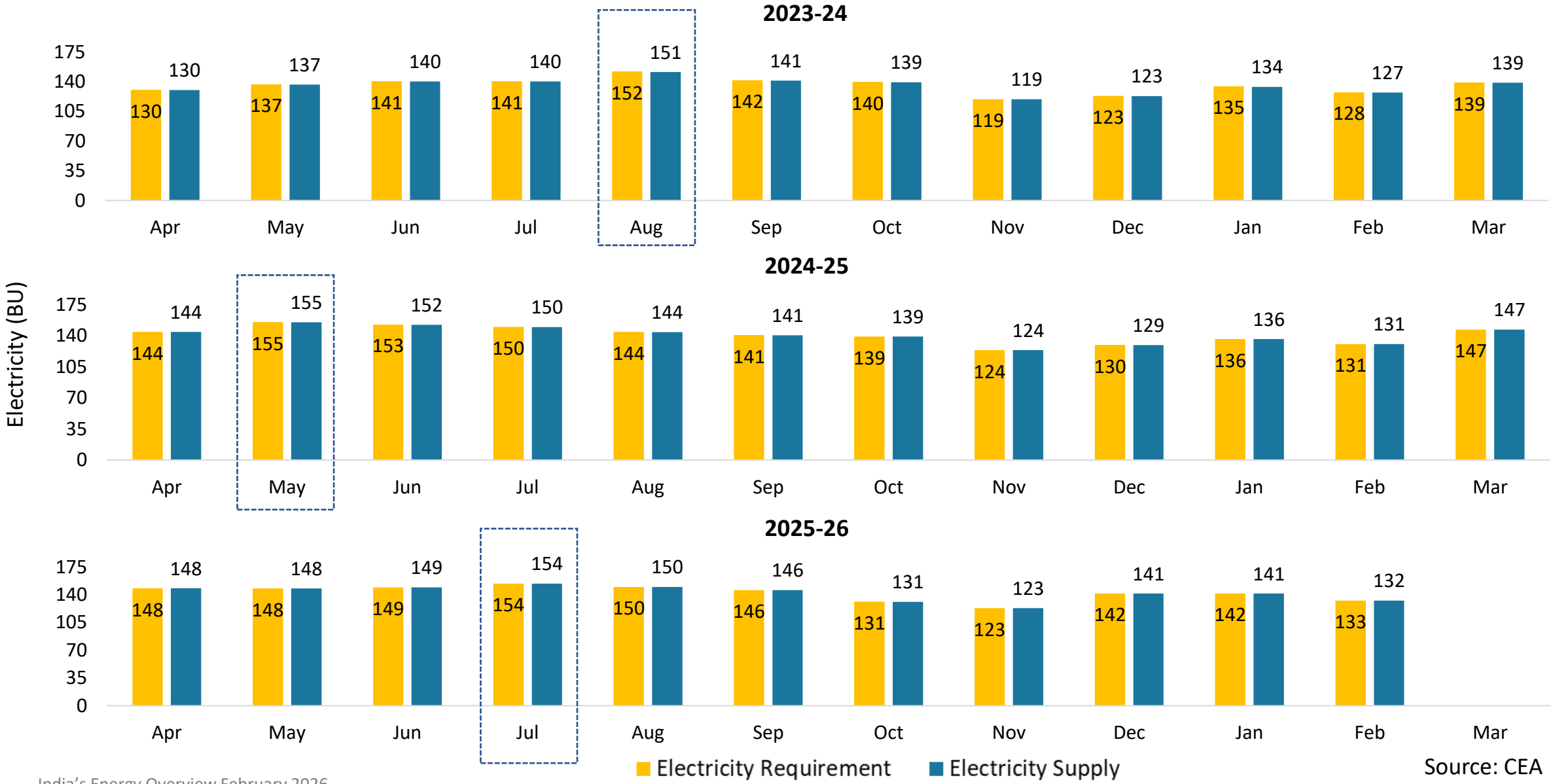
Month	Electricity Demand (BU)	Electricity Supply (BU)	Gap (BU) (+/-)
Feb'2024	128	127	0.3
Feb'2025	131	131	0.0
Feb'2026	132	132	0.0

Apr-Feb	Electricity Demand (BU)	Electricity Supply (BU)	Gap (BU) (+/-)
FY 2023-24	1,487	1,483	4.0
FY 2024-25	1,547	1,545	1.6
FY 2025-26	1,559	1,559	0.5

NOTE: The demand represented above includes intra state T&D losses.

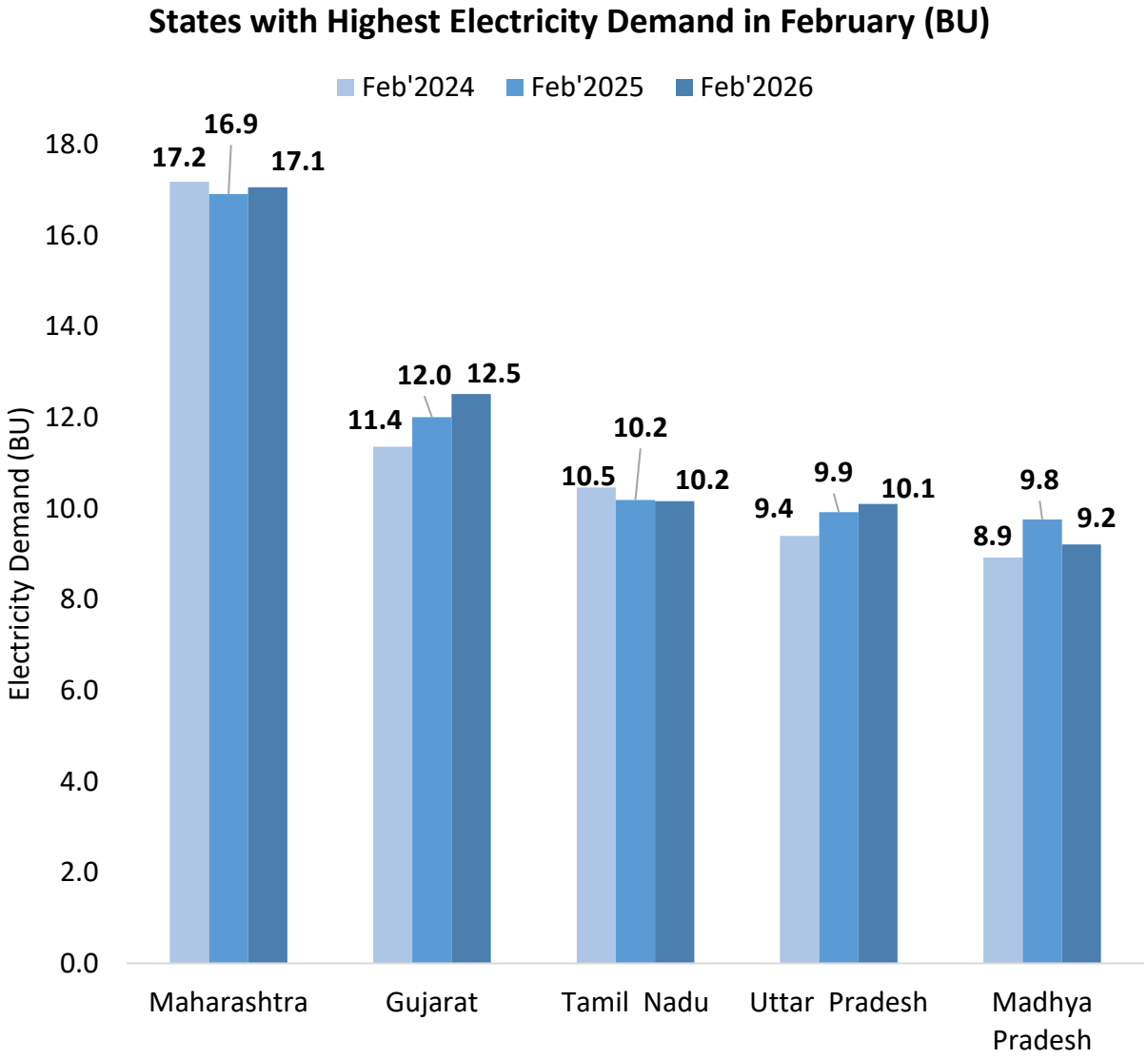
Source: CEA

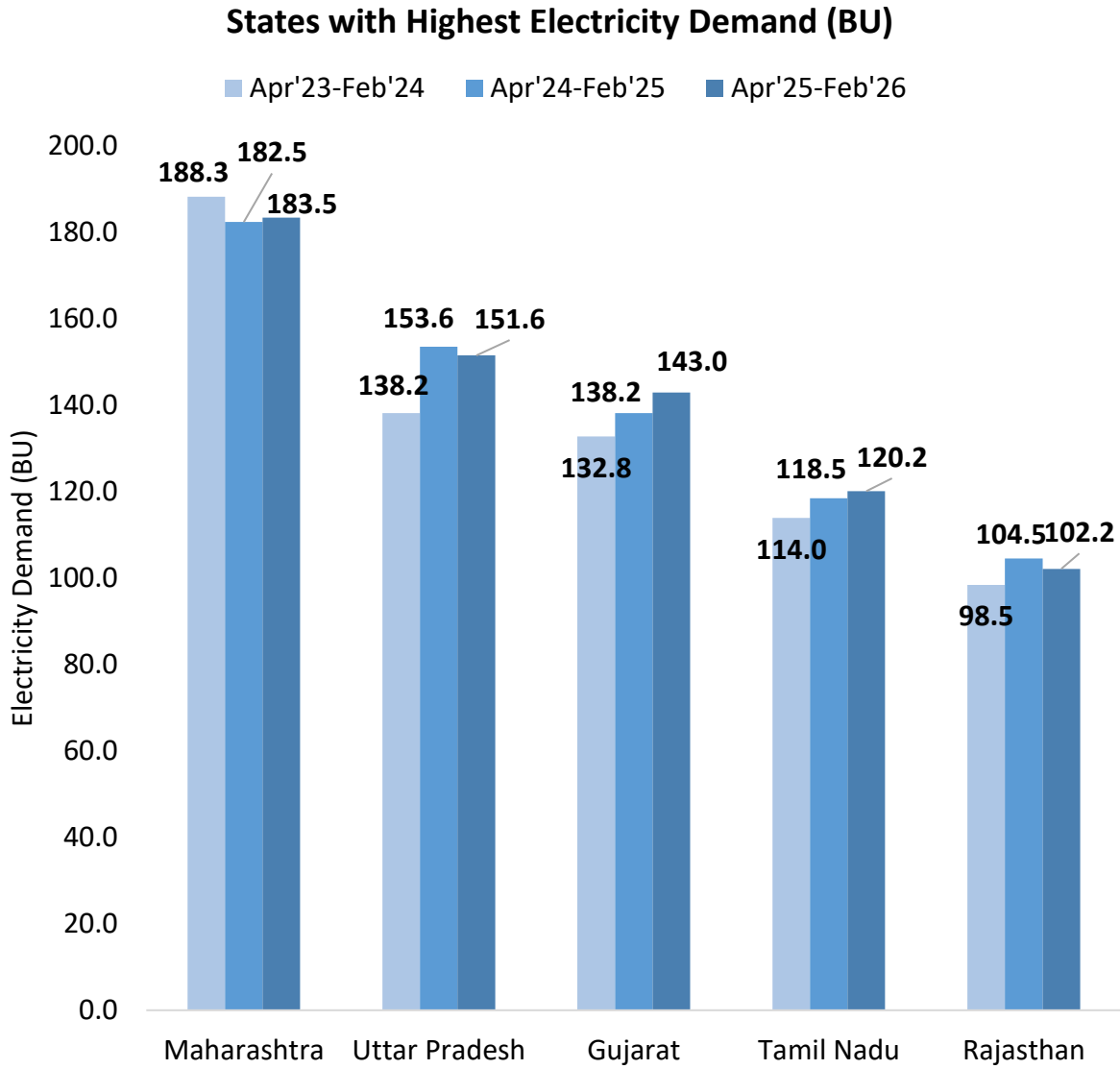
India’s Monthly Electricity Requirement and Supply



Source: CEA

Monthly Electricity Demand of the top 5 states

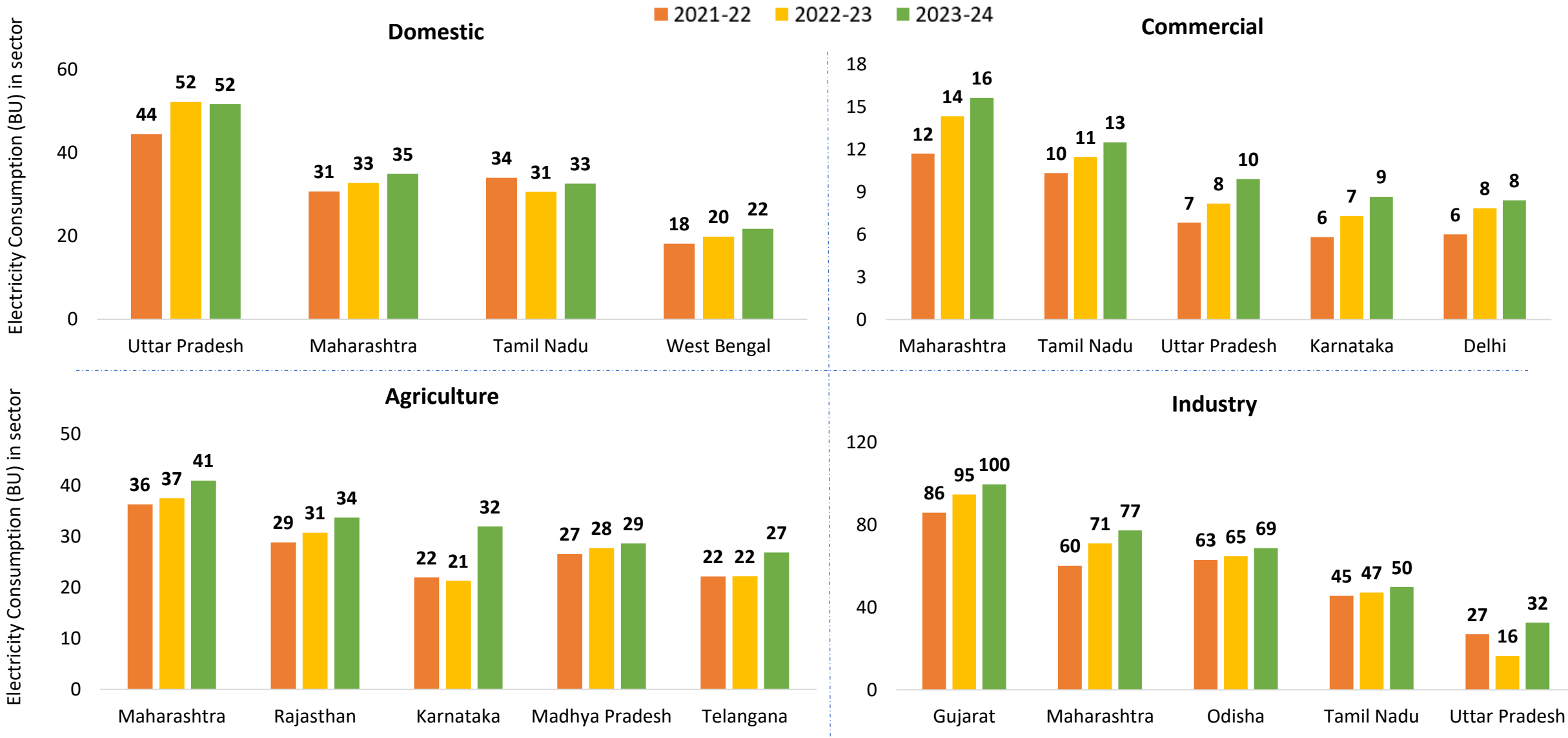




Note: The electricity demand data for Jan'26 is Provisional.

Source: CEA

Electricity Consumer-category wise top 5 States

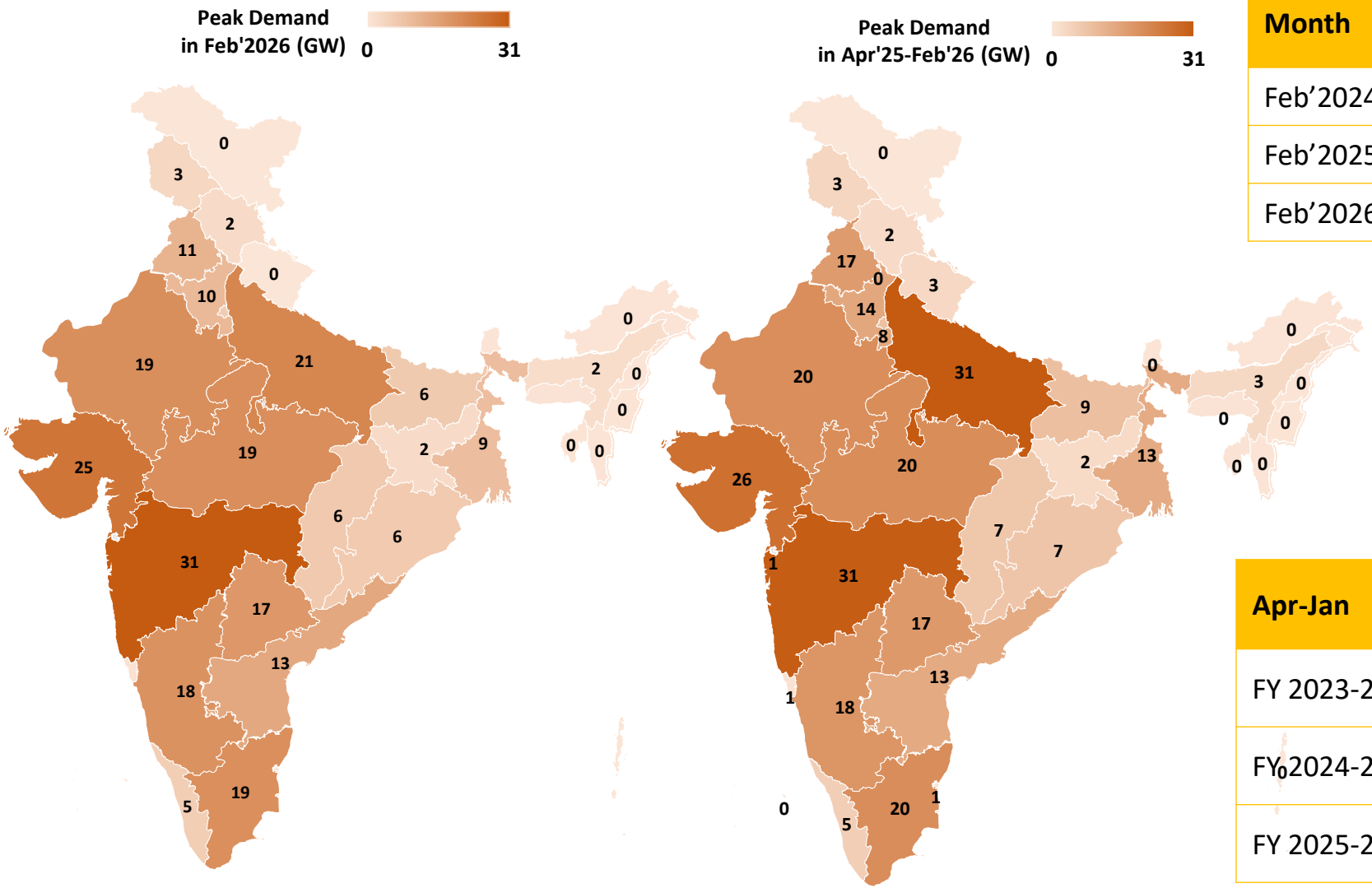


NOTE: Top 5 States under consumer-categories are selected on the basis of 2023-24

Source: CEA

National and State level Peak Electricity Demand

State-level Peak Electricity Demand (GW)



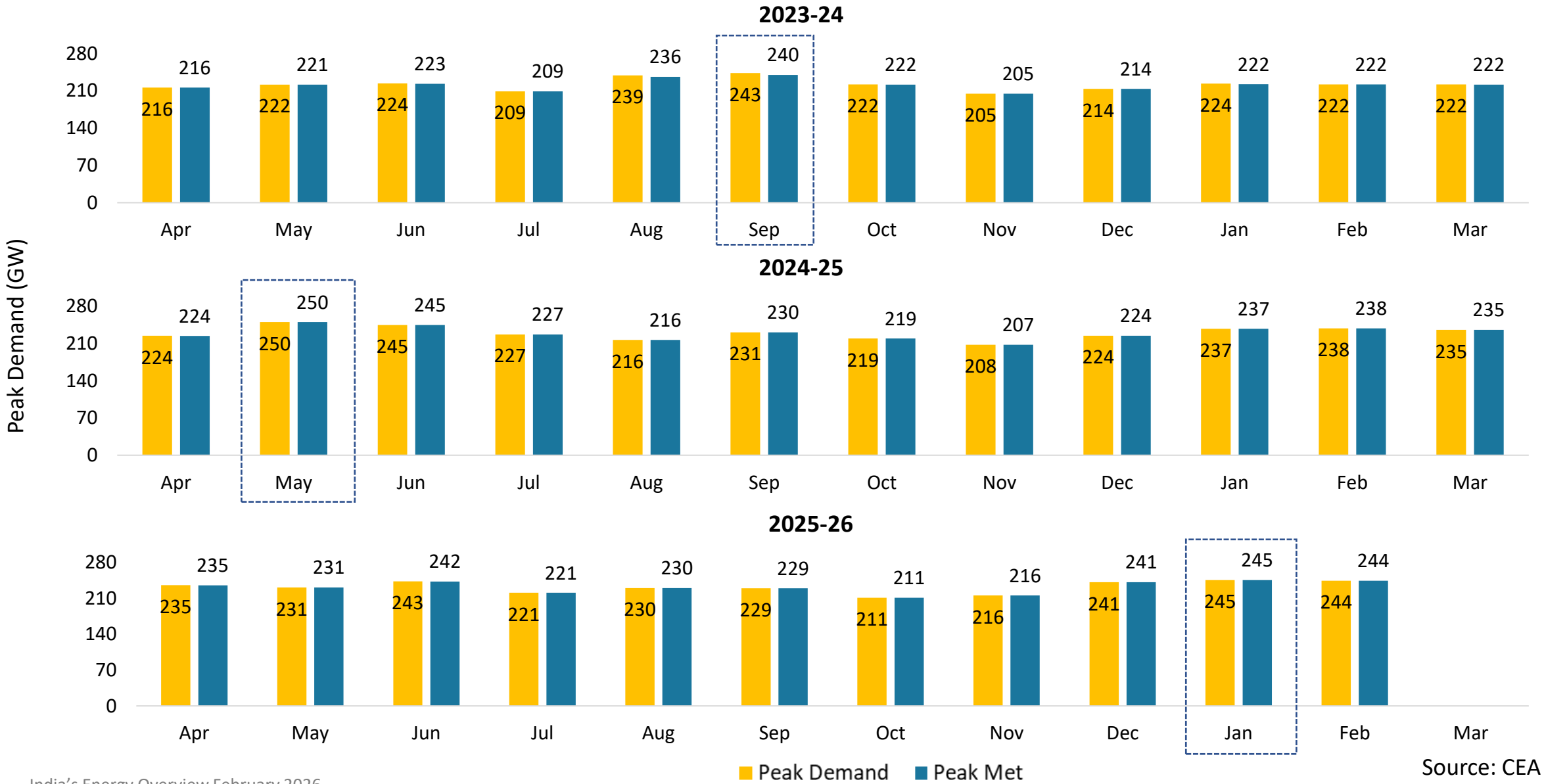
Month	Peak Demand (GW)	Peak Supply (GW)	Gap(GW) (+/-)
Feb'2024	222	222	1.6
Feb'2025	238	238	0.1
Feb'2026	244	244	0.0

Apr-Jan	Peak Demand (GW)	Peak Supply (GW)	Gap (GW) (+/-)
FY 2023-24	243	240	3.3
FY 2024-25	250	250	0.0
FY 2025-26	245	245	0.0

Note: The peak electricity demand data for Feb'26 is Provisional.

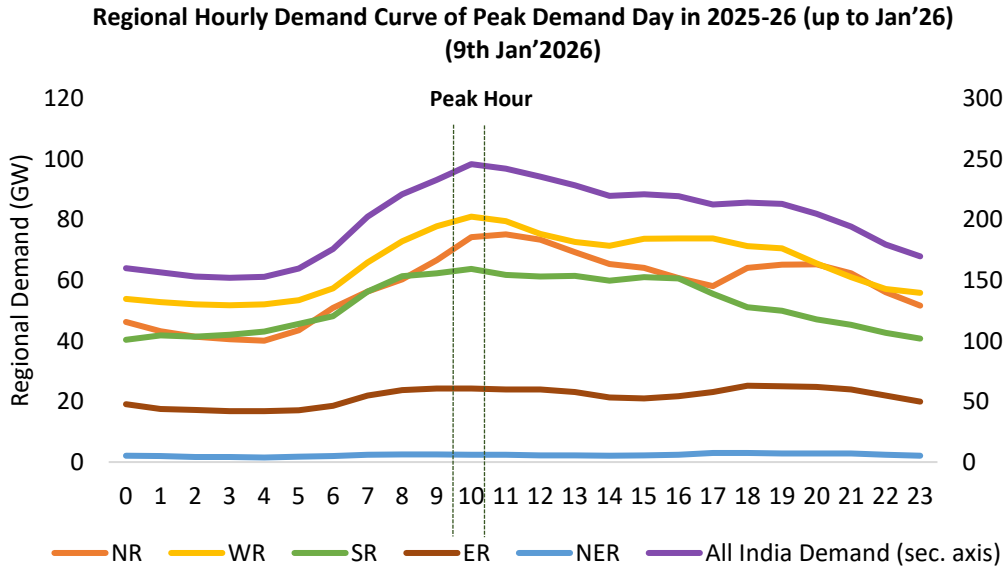
Source: CEA

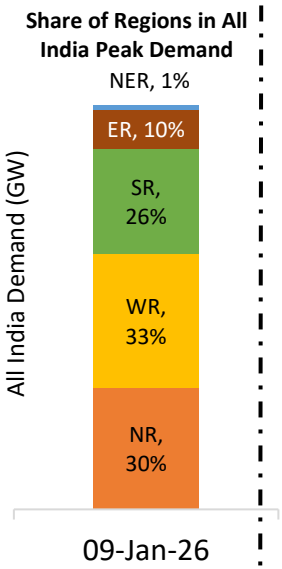
India’s Monthly Peak Electricity Demand and Supply

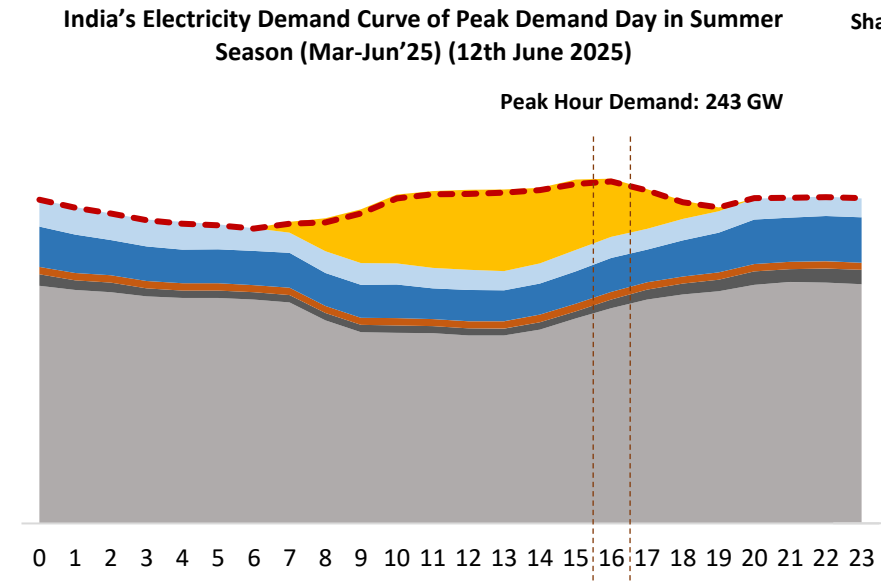


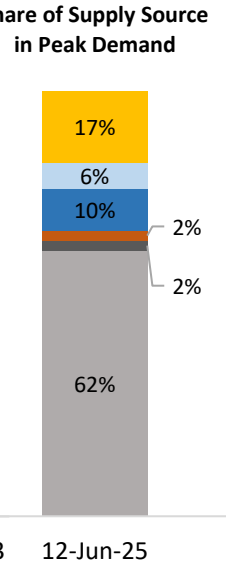
Source: CEA

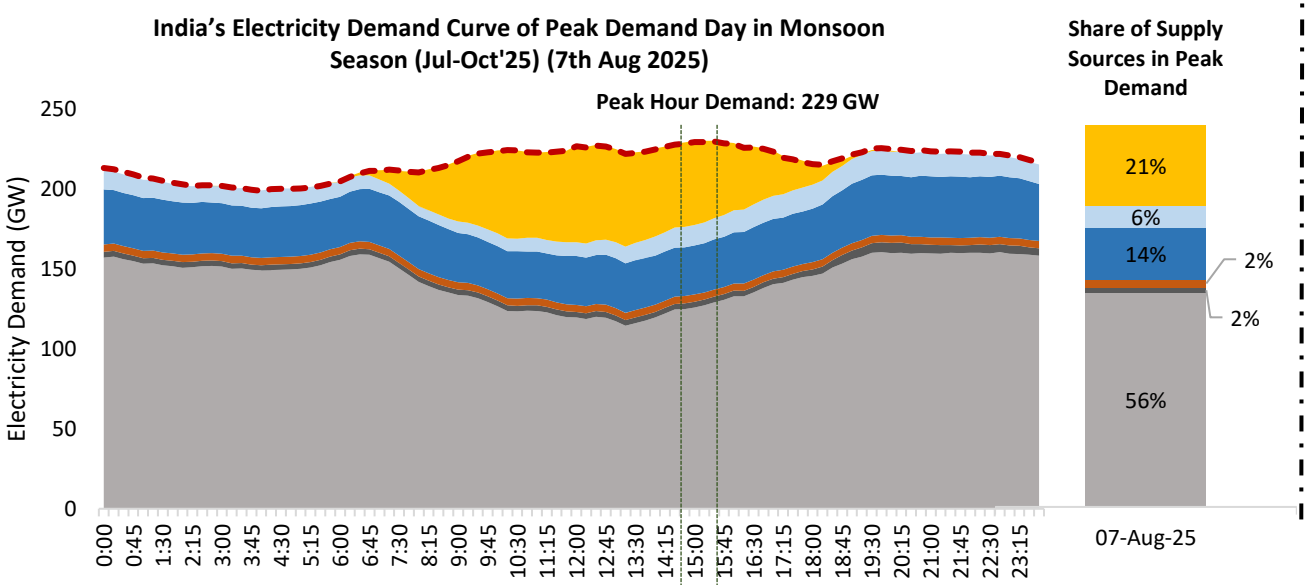
All India and Regional Electricity Demand Curve of Peak Demand Day

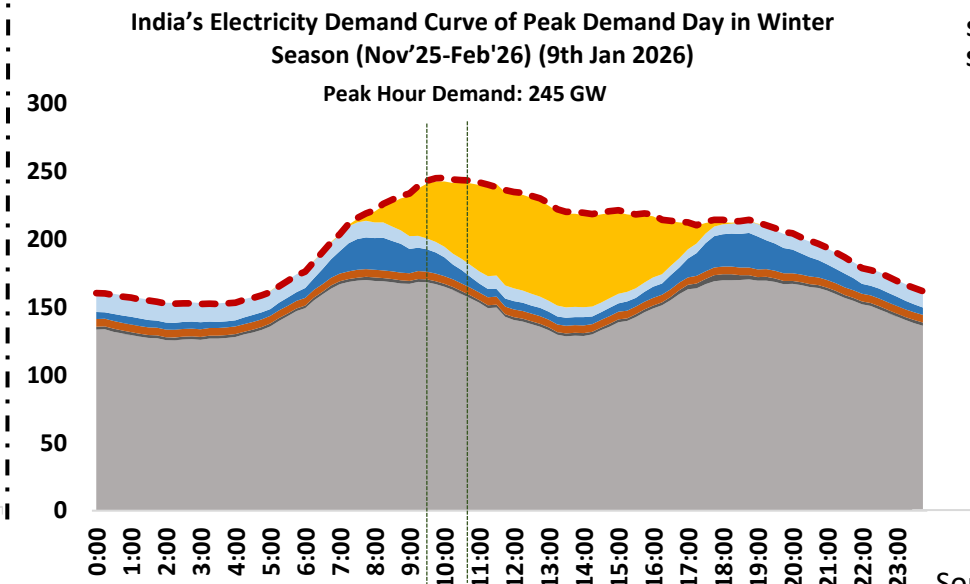


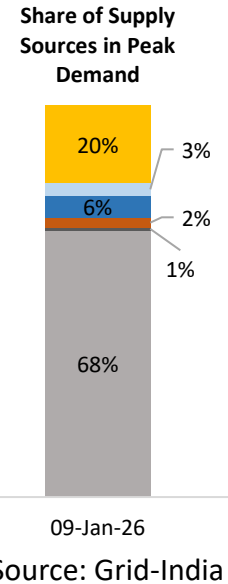








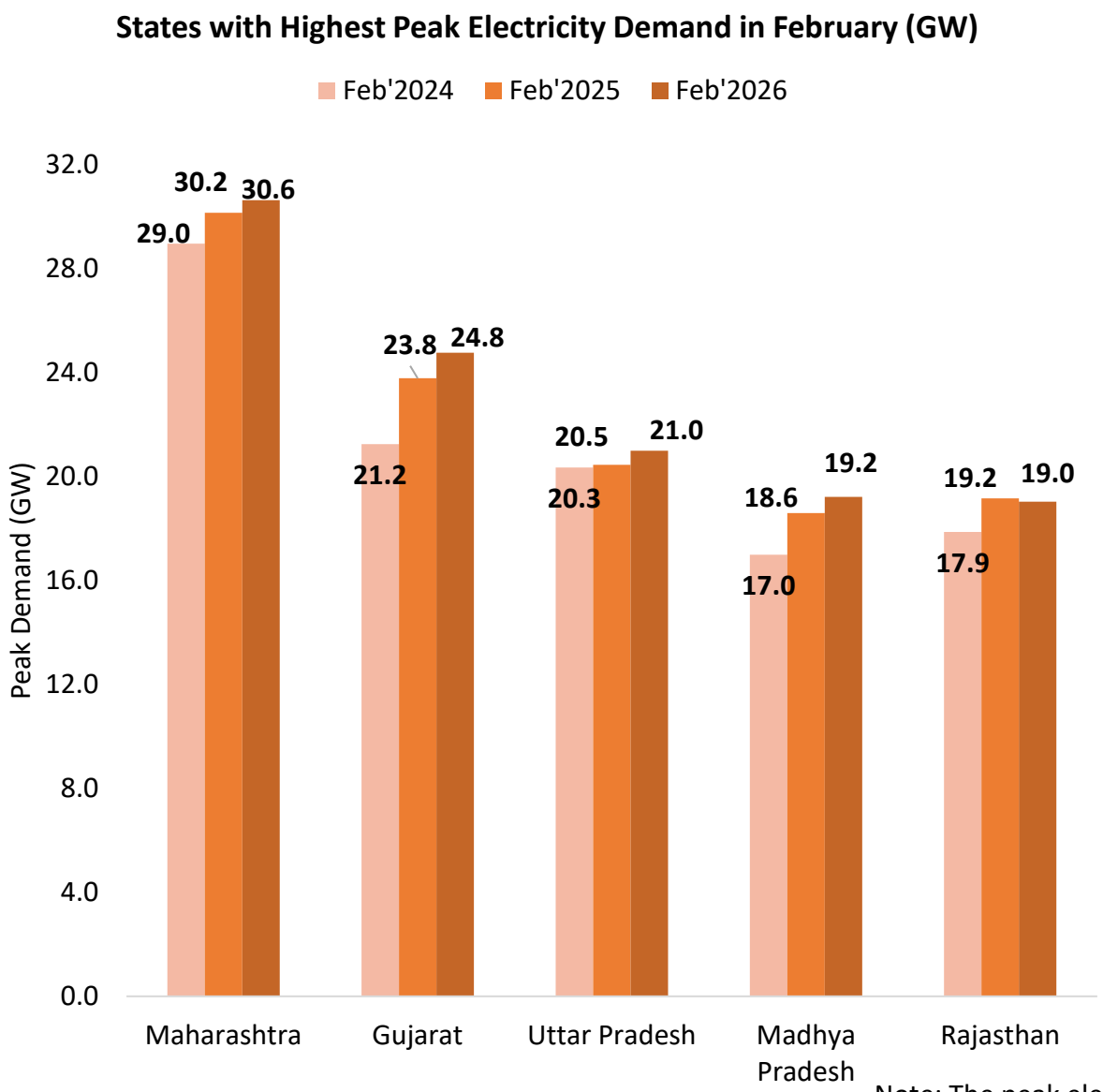


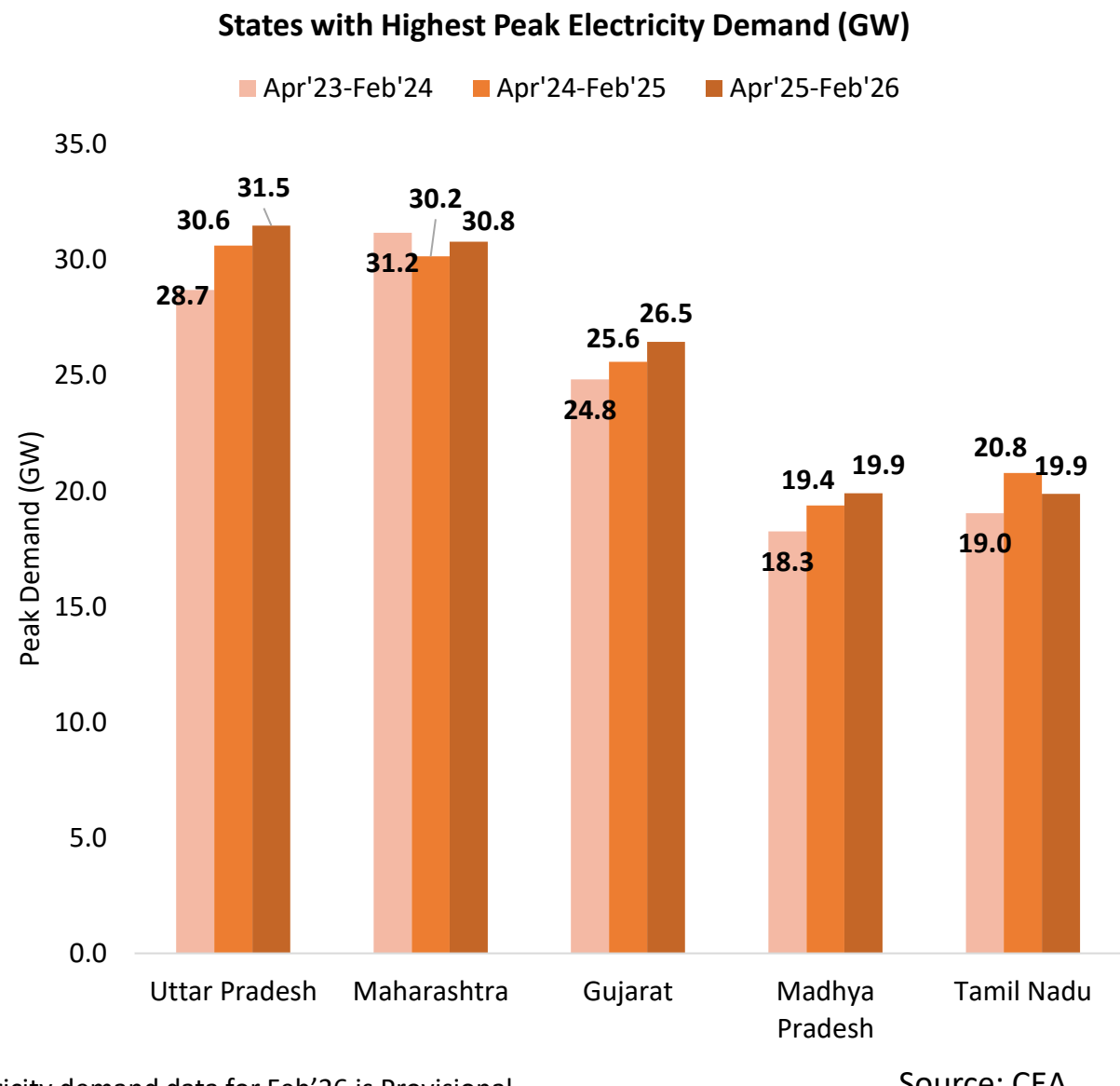


Coal Gas Nuclear Hydro Wind Solar Gross Demand

Source: Grid-India

Monthly Peak Electricity Demand of the top 5 states

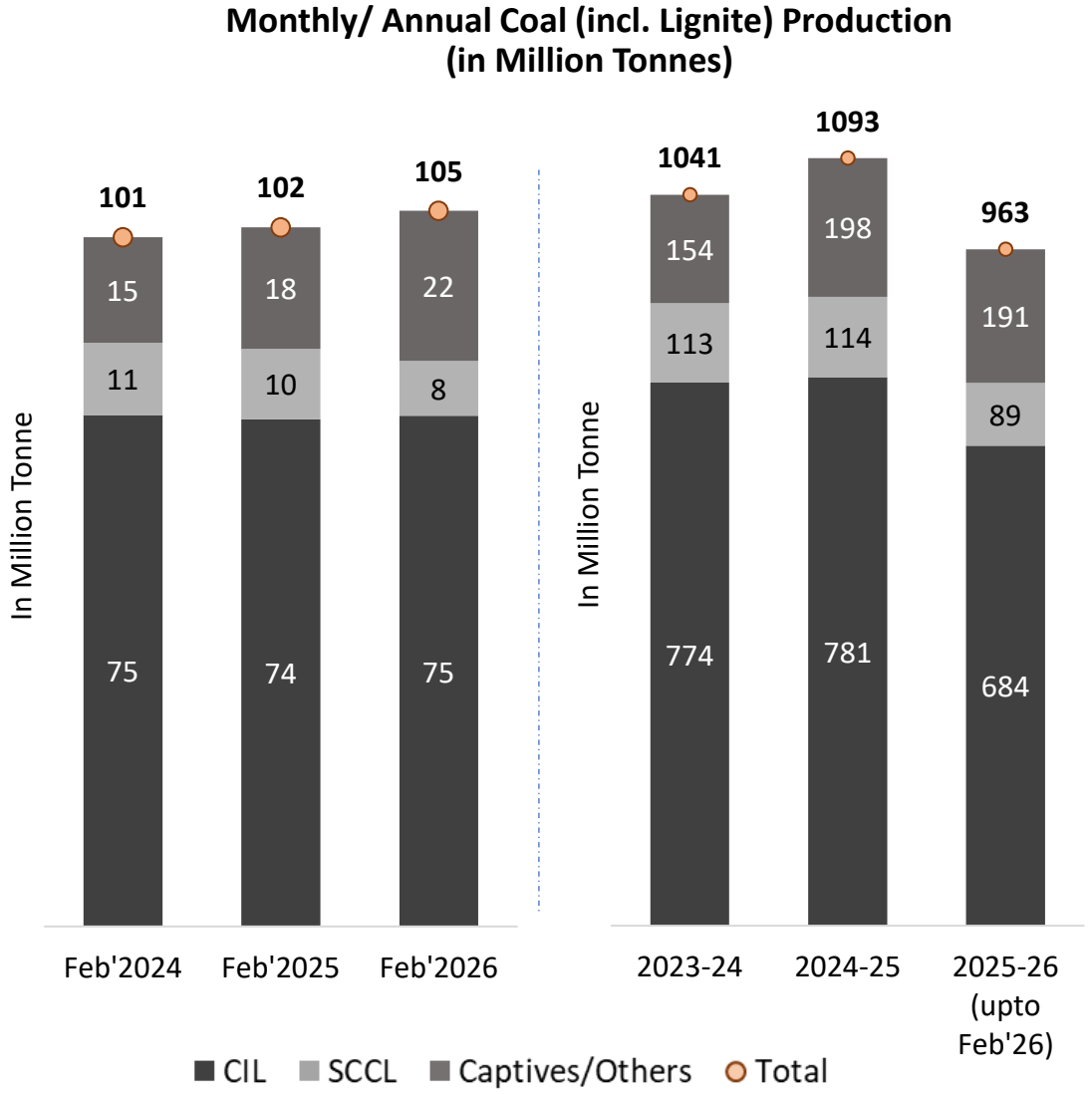


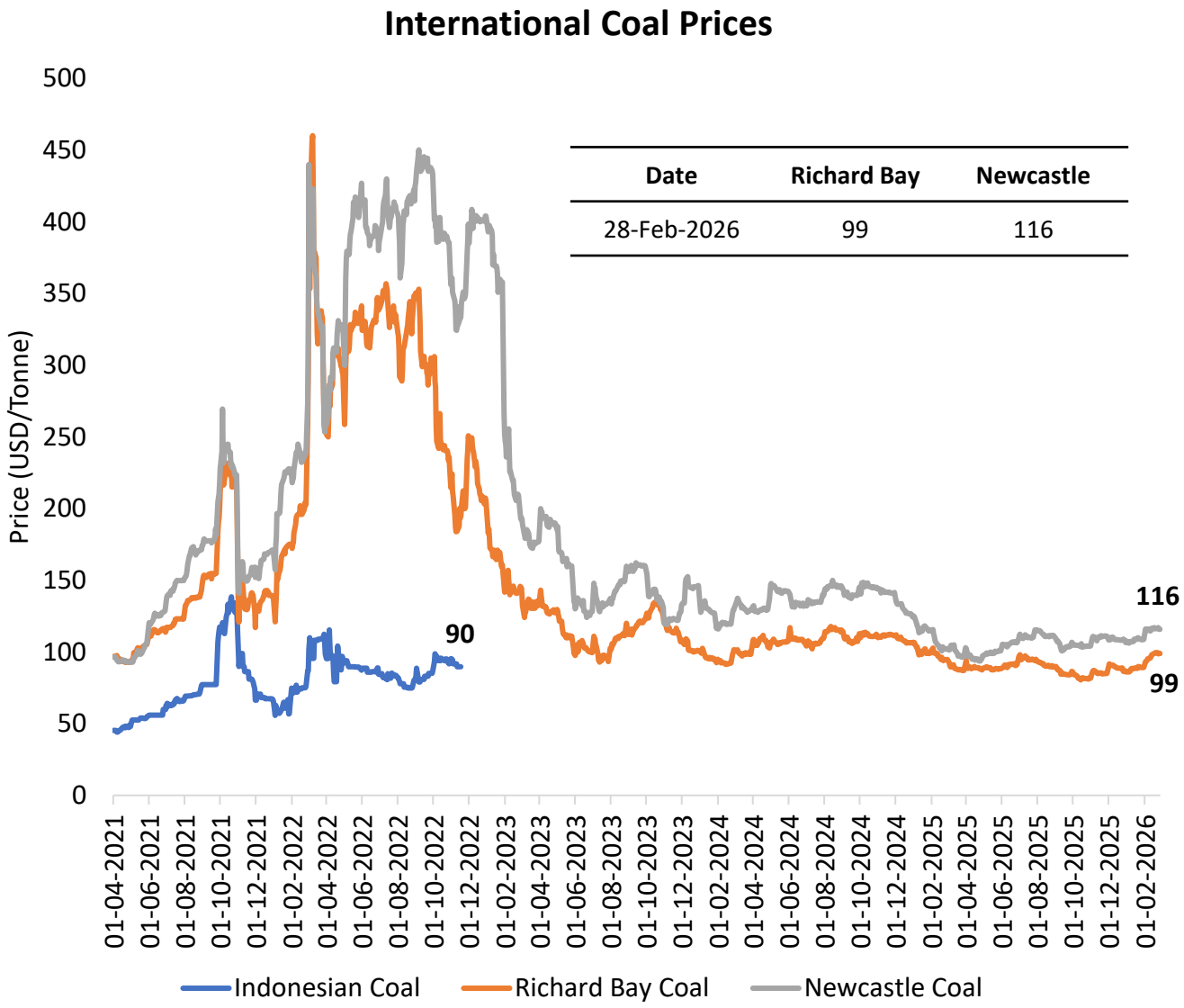


Note: The peak electricity demand data for Feb'26 is Provisional.

Source: CEA

Monthly Coal Statistics



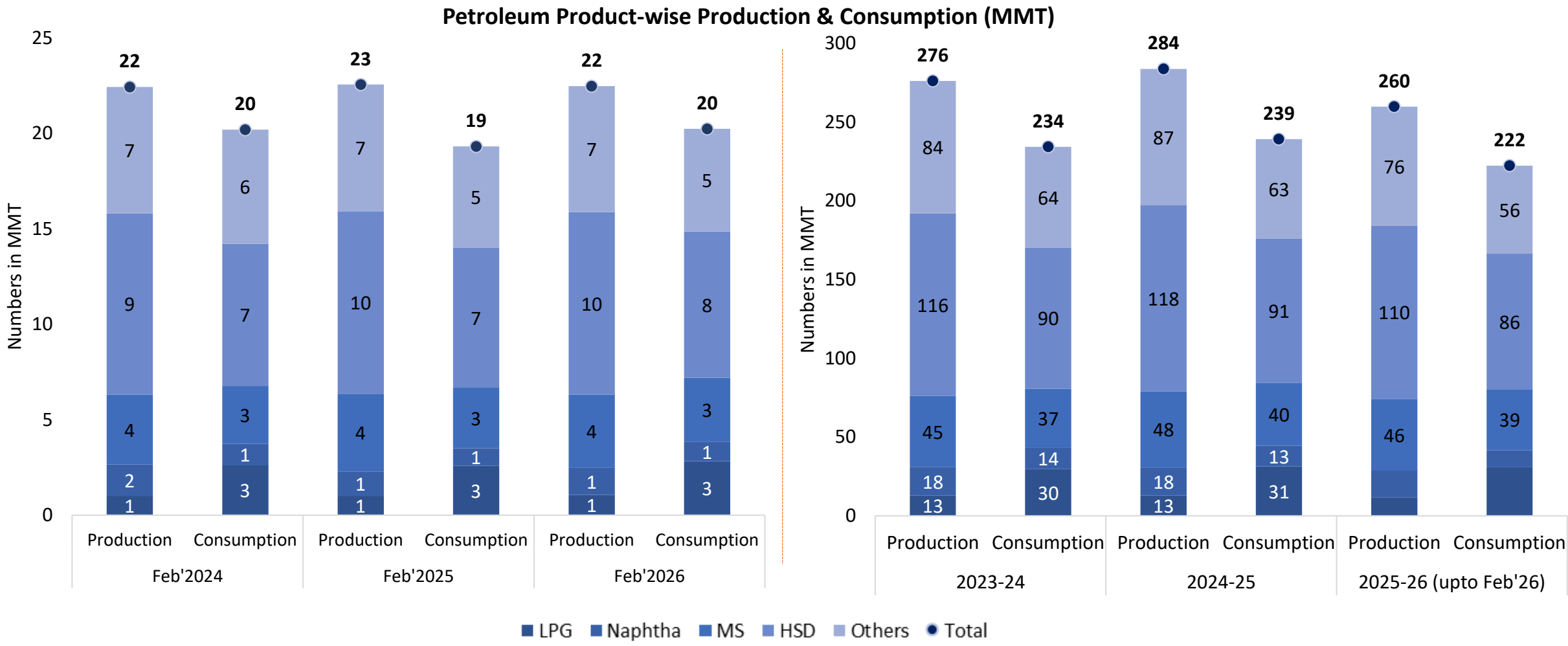


Date	Richard Bay	Newcastle
28-Feb-2026	99	116

Source: Ministry of Coal

Source: Investing.com

Oil Market Scenario (1/3)



Others include ATF, SKO, LDO, Lubes, FO, LSHS, Bitumen, pet coke, and others.

Abbreviations: ATF- Aviation Turbine Fuel, FO- Furnace Oil, HSD- High-Speed Diesel, LDO- Light Diesel Oil, MS- Motor Spirit (Petrol), SKO- Superior Kerosene Oil, LSHS- Low Sulphur Heavy Stock, LPG- Liquefied Petroleum Gas, MMT- Million Metric Tonne

NOTE: The data is available latest up to February 2026.

Source: PPAC

Oil Market Scenario (2/3)

Import/Export of Crude Oil and Petroleum Products ('000 Tonnes)							
Petroleum Products	Import/ Export	Monthly			Yearly		
		Feb'24	Feb'25	Feb'26	2023-24	2024-25	2025-26 (up to Feb'26)
Crude Oil	Import	18244	19466	19431	234262	243225	225683
	Export	0	0	0	0	0	0
	Net Import	**18244**	**19466**	**19431**	**234262**	**243225**	**225683**
LPG	Import	1750	1568	1721	18514	20667	20503
	Export	45	49	50	525	551	522
	Net Import	**1705**	**1520**	**1671**	**17989**	**20116**	**19982**
Diesel	Import	11	7	3	42	42	32
	Export	2396	2329	1705	28204	28027	25266
	Net Import	**-2385**	**-2322**	**-1701**	**-28162**	**-27985**	**-25234**
Petrol	Import	0	0	0	717	235	0
	Export	1256	1687	1387	13472	15830	15474
	Net Import	**-1256**	**-1687**	**-1387**	**-12755**	**-15596**	**-15474**
Others	Import	2766	2378	2088	29419	29960	24758
	Export	1620	1563	1217	20391	20667	15677
	Net Import	**1146**	**815**	**872**	**9029**	**9293**	**9082**

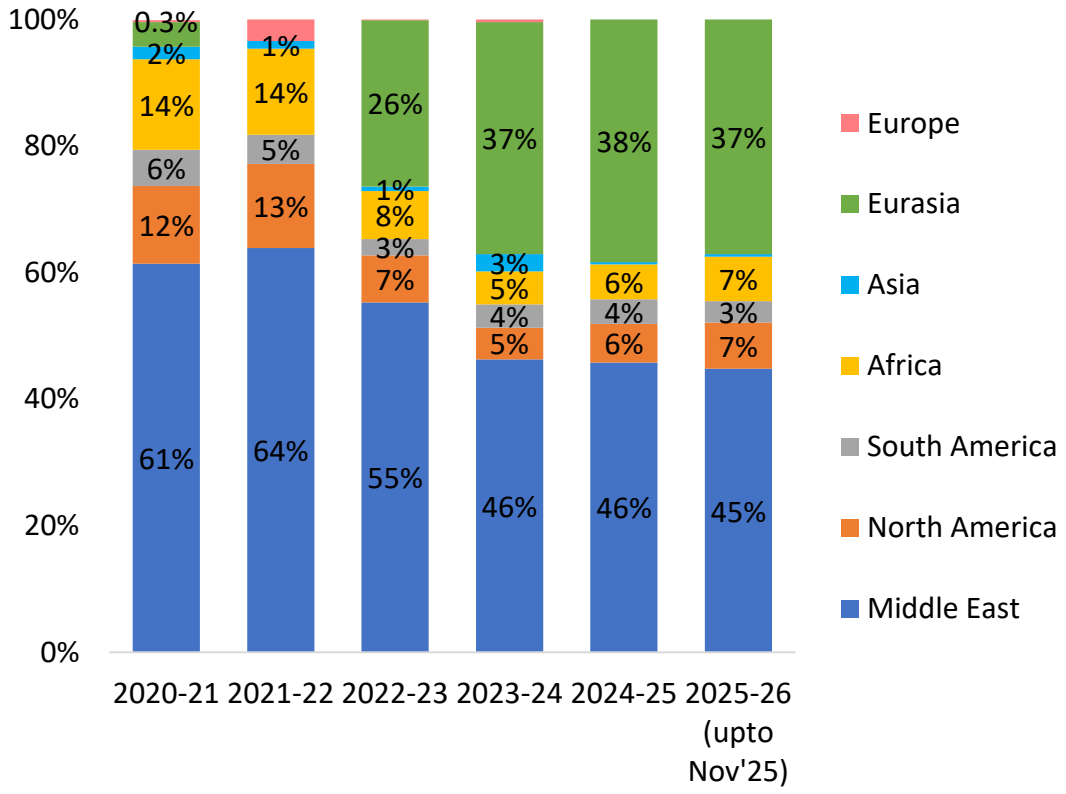
*Others include ATF, Naphtha, SKO, LDO, Lubes, FO, LSHS, Bitumen, pet coke, and others.

NOTE: The data is available latest up to February 2026.

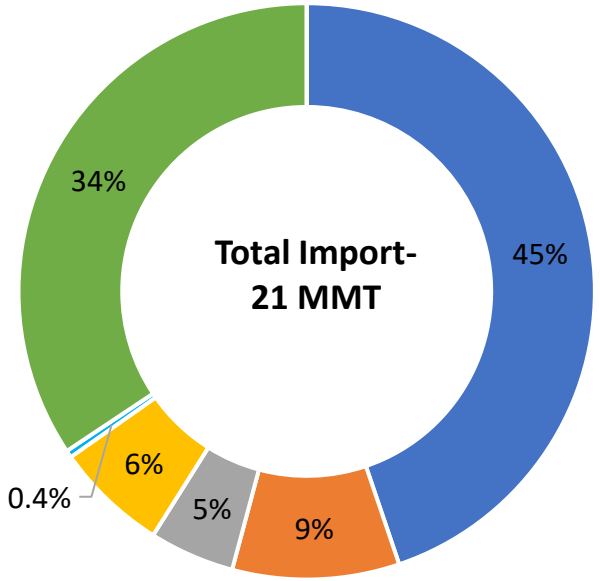
Source: PPAC

Oil Market Scenario (3/3)

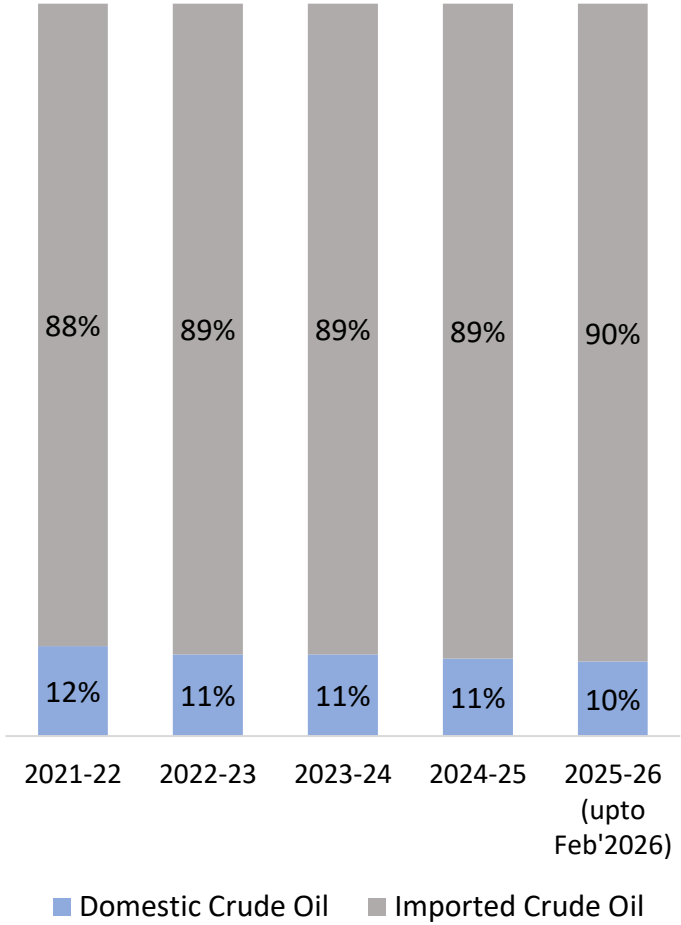
Region-wise Share in Import of Crude Oil (%)



Regional share of Imported Crude oil in November 2025



Domestic and Imported Crude Oil share in India (%)

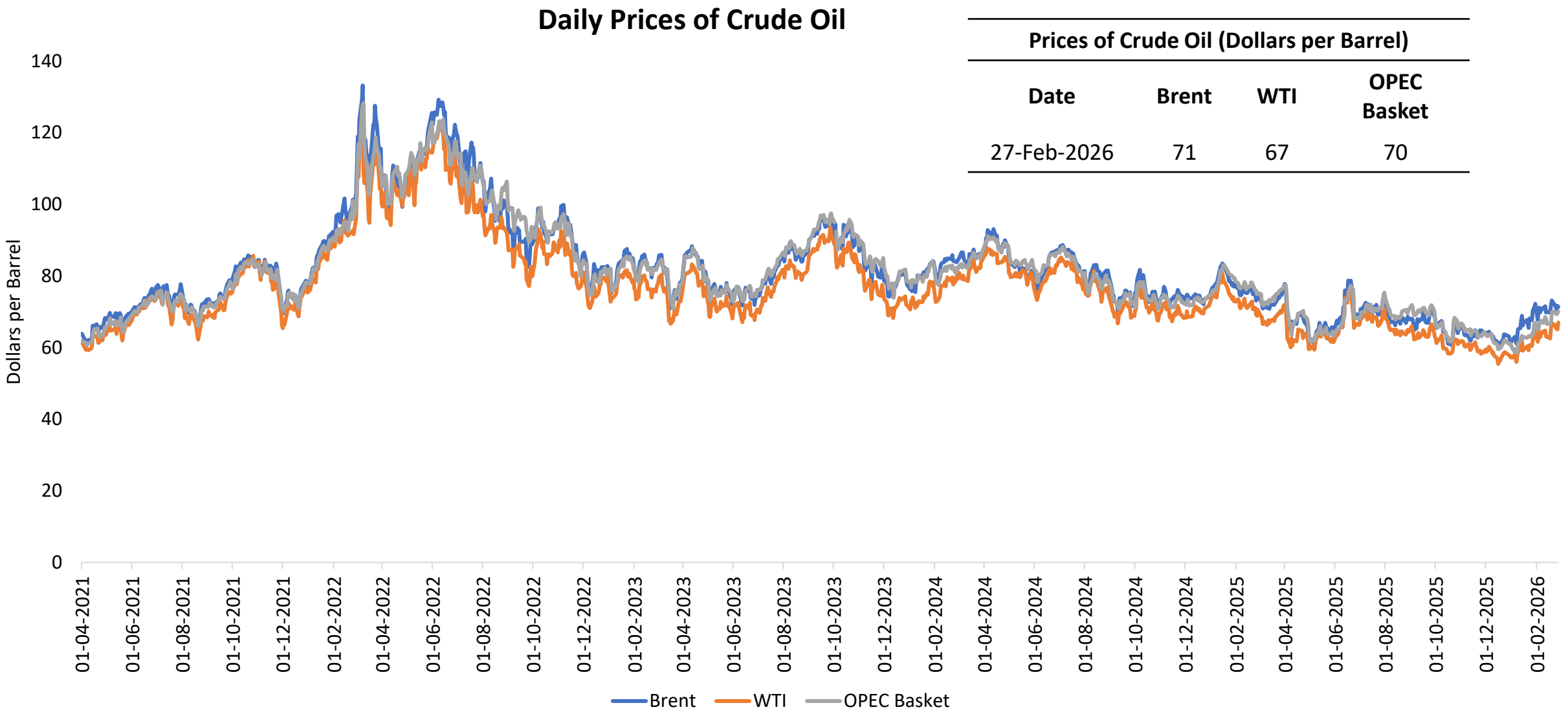


Total Import of Crude Oil (MMT)			
Total Import	2023-24	2024-25	2025-26 (up to Feb'26)
Crude Oil	**234**	**243**	**226**

NOTE: The data is based on the latest available information.

Source: MoPNG and PPAC

Daily Prices of Crude Oil

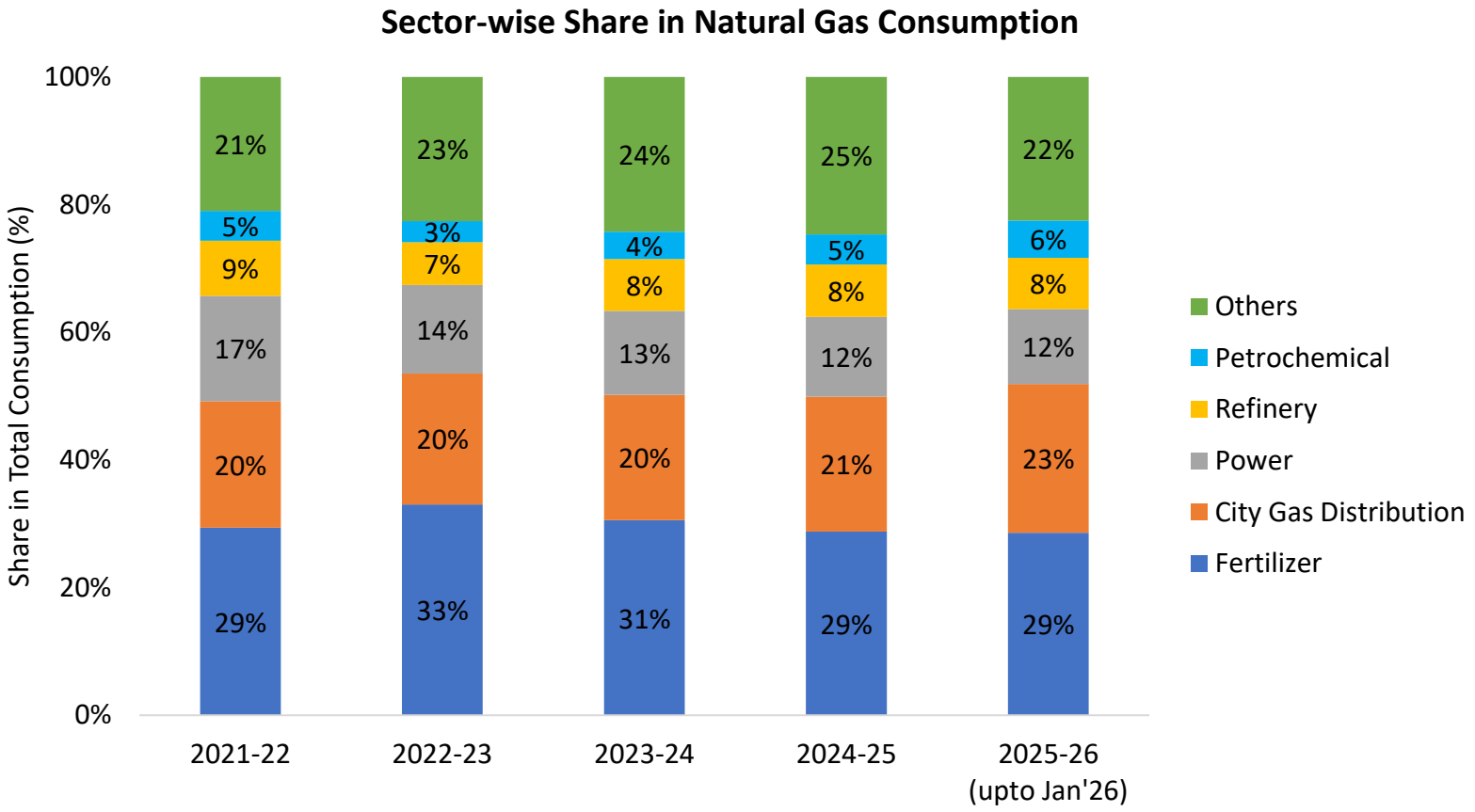


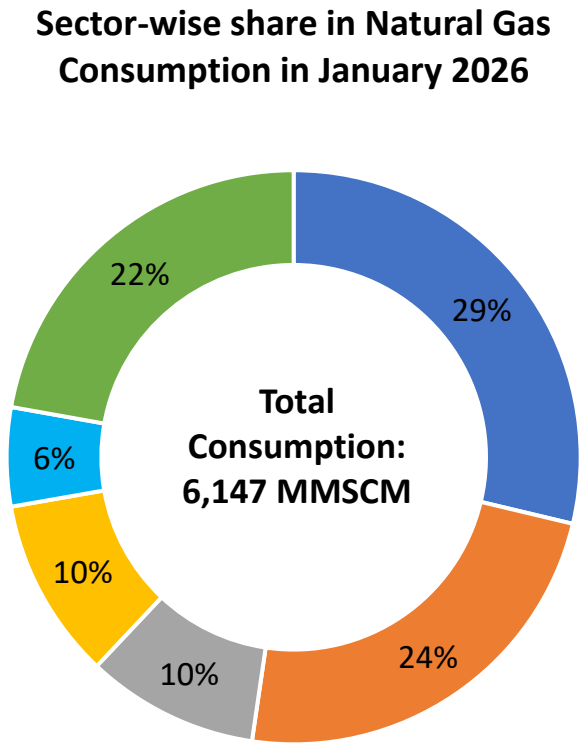
Prices of Crude Oil (Dollars per Barrel)

Date	Brent	WTI	OPEC Basket
27-Feb-2026	71	67	70

Source: EIA & OPEC

Gas Market Scenario (1/2)





Total Consumption of Natural Gas (NG) (MMSCM)					
Total Consumption	2021-22	2022-23	2023-24	2024-25	2025-26 (up to Jan'26)
Natural Gas	**61,491**	**58,702**	**68,809**	**71,196**	**58,802**

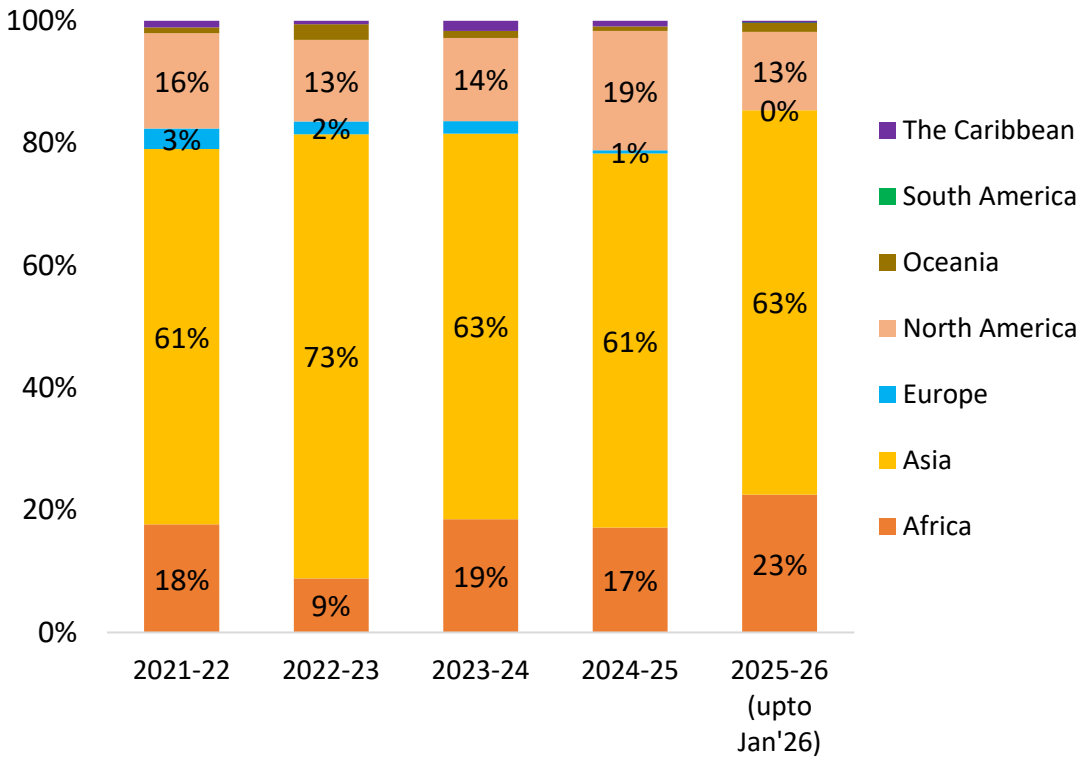
Others include- Internal Consumption of Pipeline System, Industrial, Sponge iron/steel, LPG shrinkage, Manufacturing, Agriculture (tea plantation), Others

NOTE: The data is available latest up to January 2026

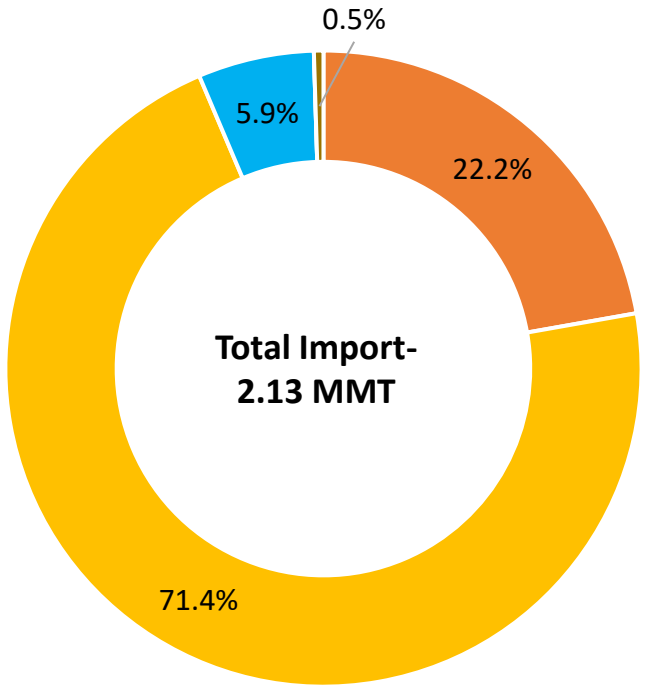
Source: PPAC

Gas Market Scenario (2/2)

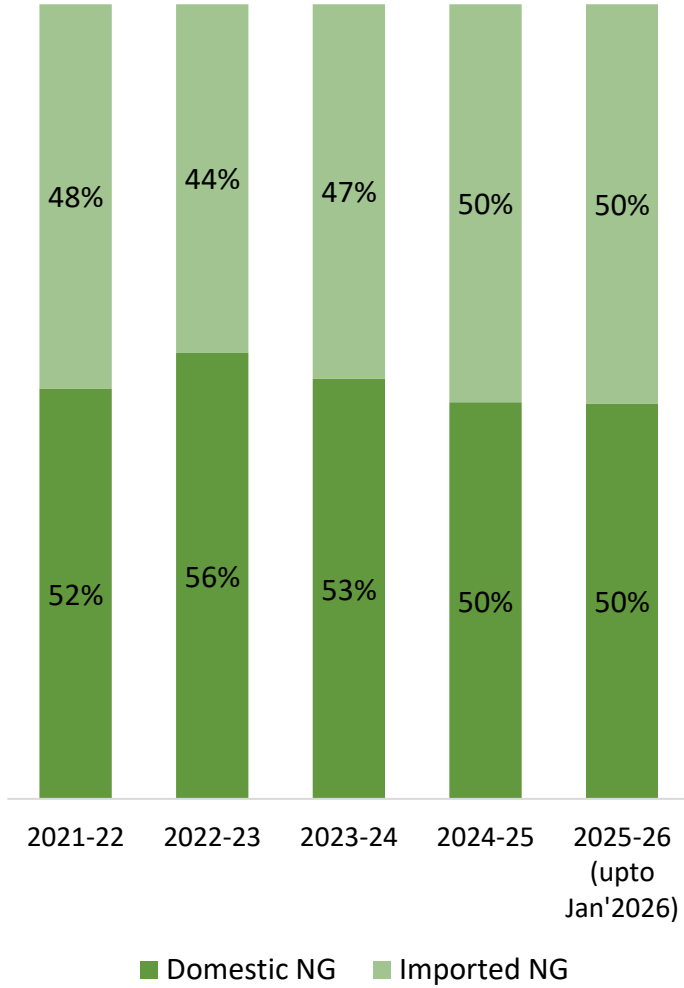
Region-wise Share in Import of LNG (%)



Country Share of Imported LNG in January 2026



Domestic and Imported Natural Gas share in India (%)



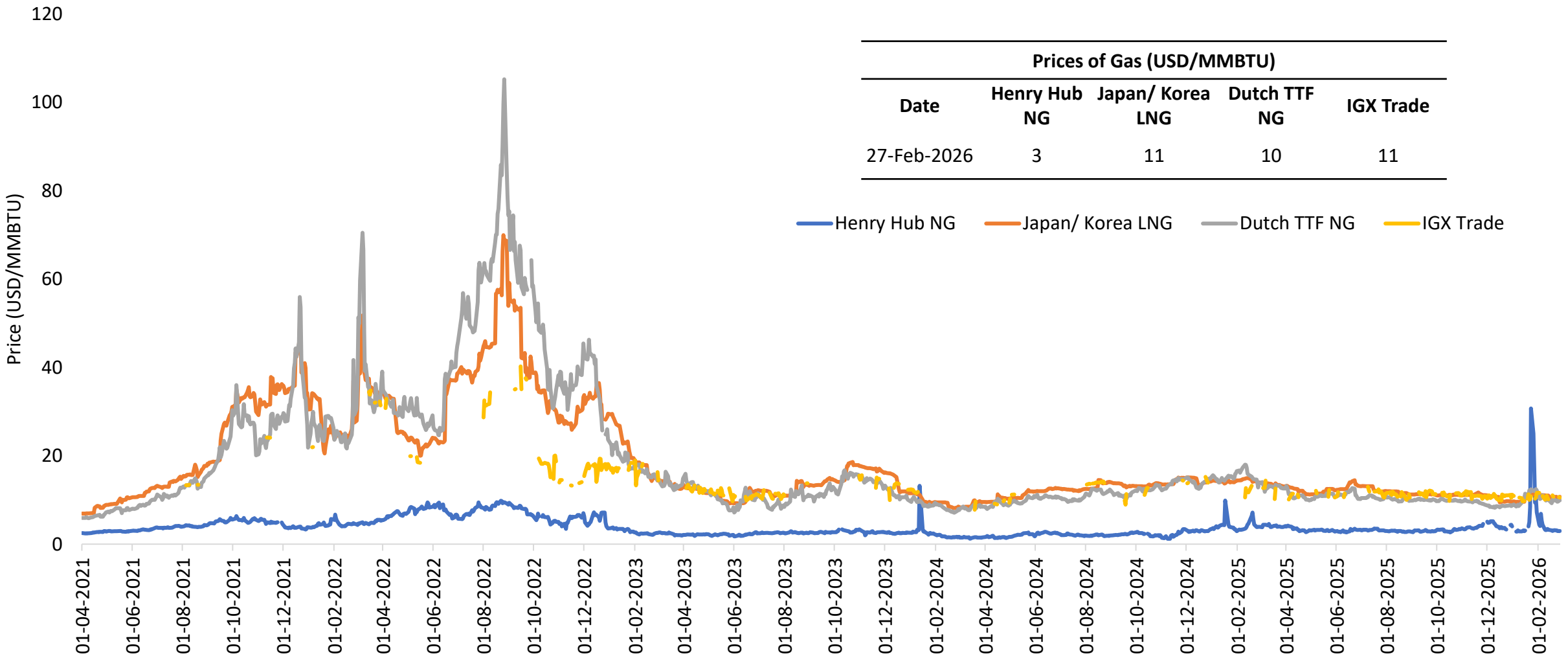
Total Import of Liquified Natural Gas (LNG) (MMT)			
Total Import	2023-24	2024-25	2025-26 (up to Jan'23)
LNG	**24.00**	**26.96**	**22.31**

NOTE: The data is based on the latest available information.

Source: MoCI and PPAC

Daily Prices of Gas

Gas Daily Market Price



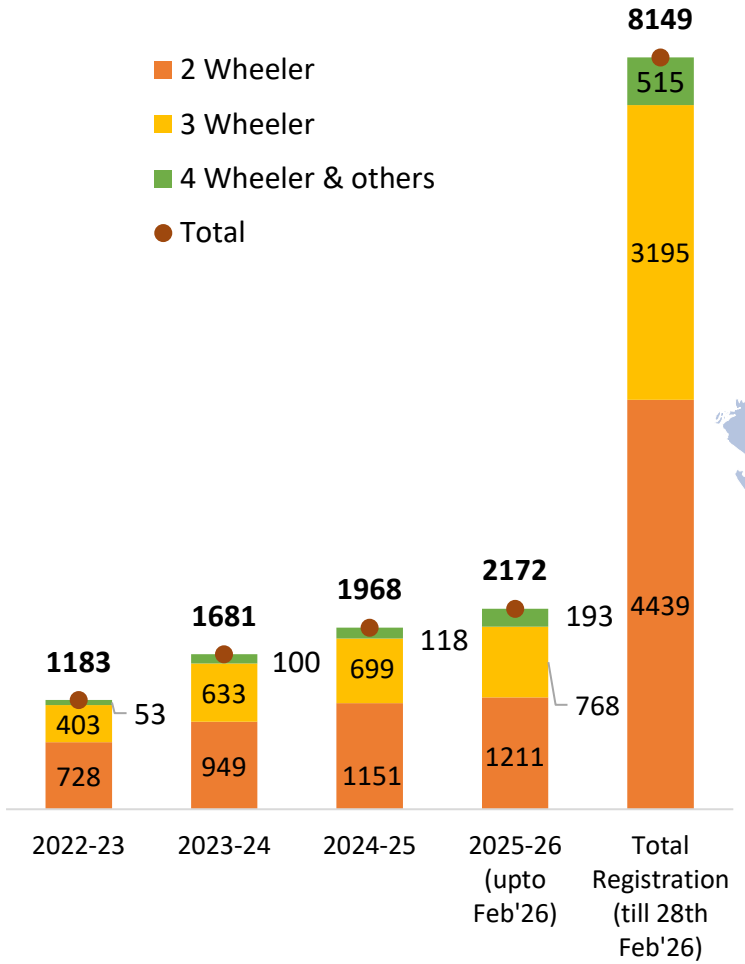
Prices of Gas (USD/MMBTU)				
Date	Henry Hub NG	Japan/ Korea LNG	Dutch TTF NG	IGX Trade
27-Feb-2026	3	11	10	11

MMBTU- Million Metric British Thermal Unit

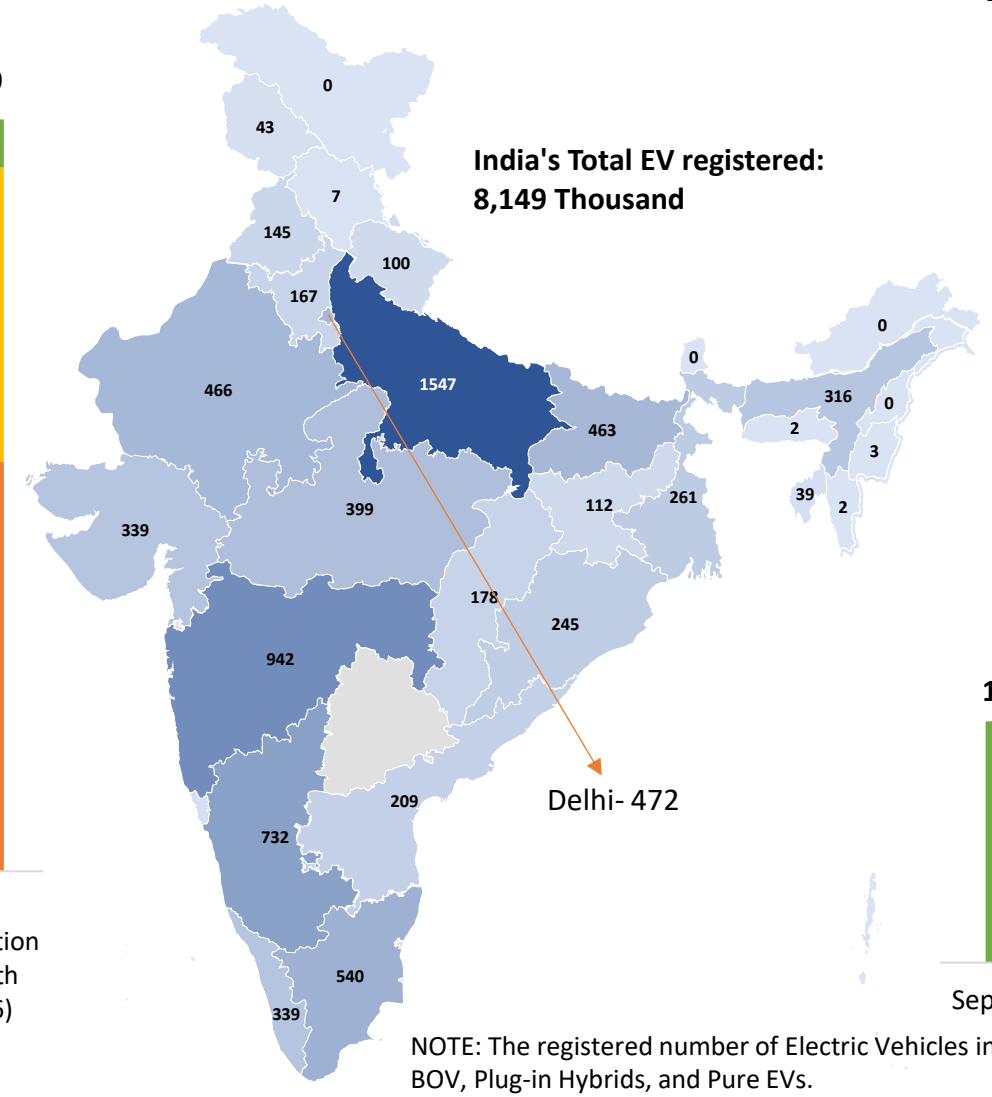
Source: EIA, Investing.com, IGX

Status of Electric Mobility in India

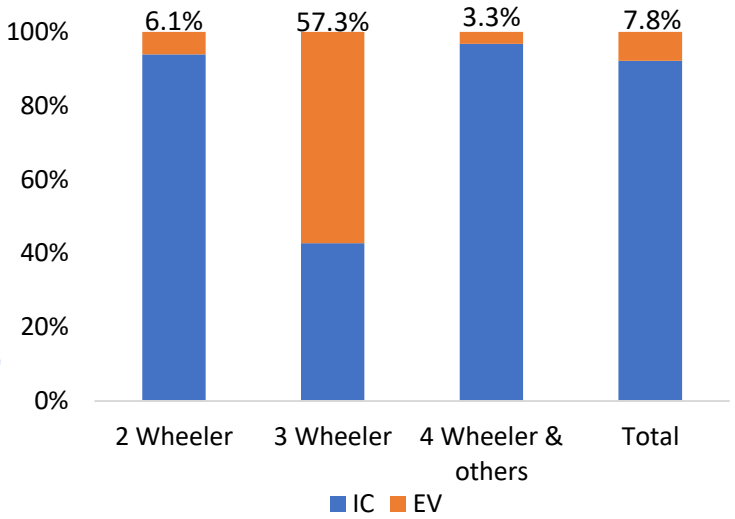
National EV registration (Number in Thousands)



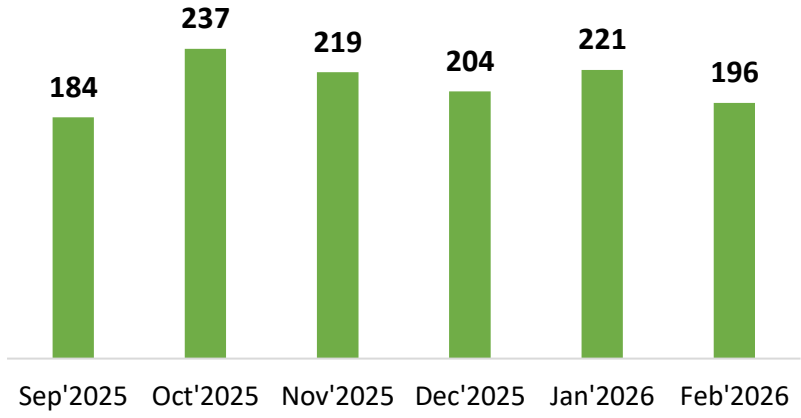
Cumulative State-wise EV registration as on 28th February 2026 (in Thousands)



EV and ICE sale composition in 2024-25



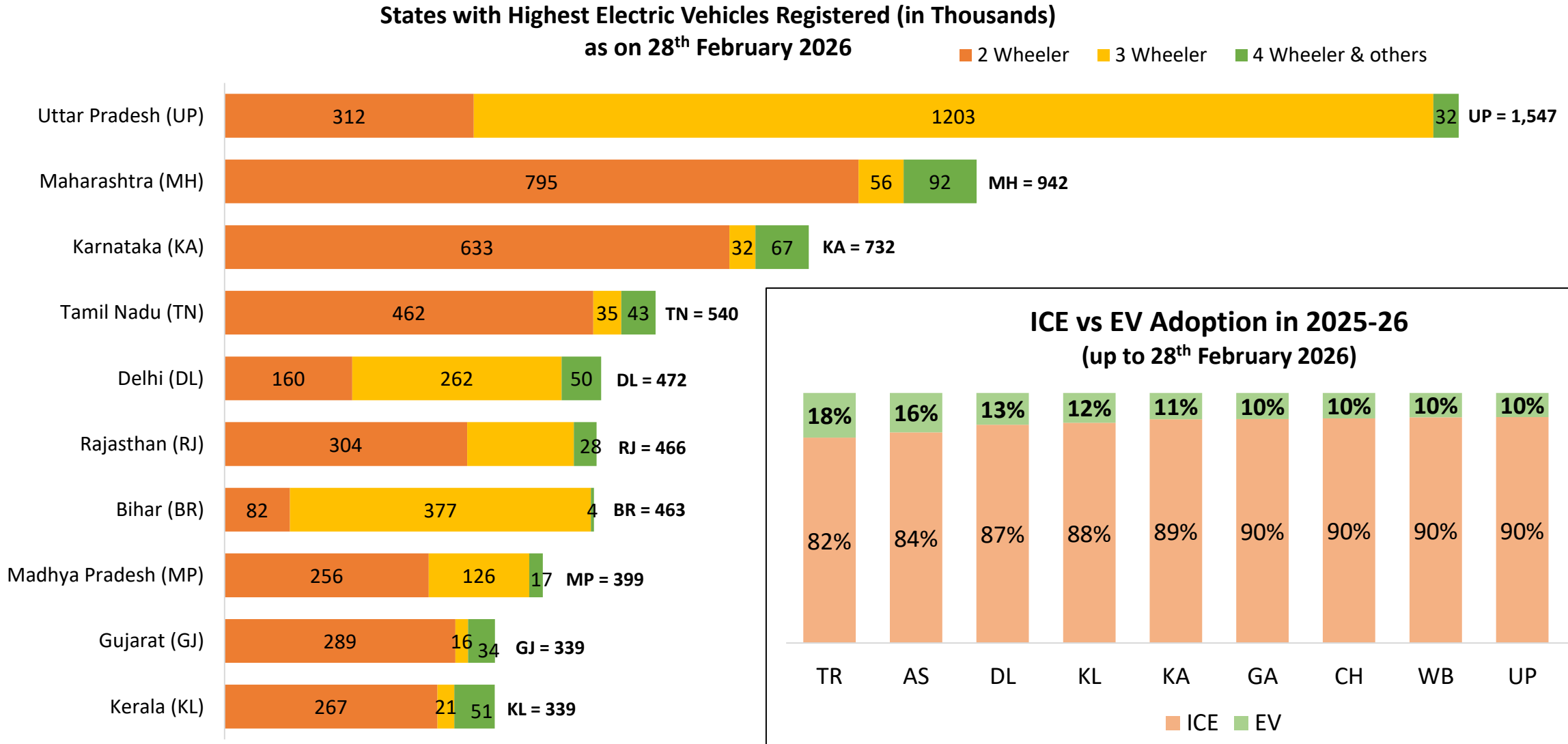
Provisional Monthly EV registered (in Thousands)

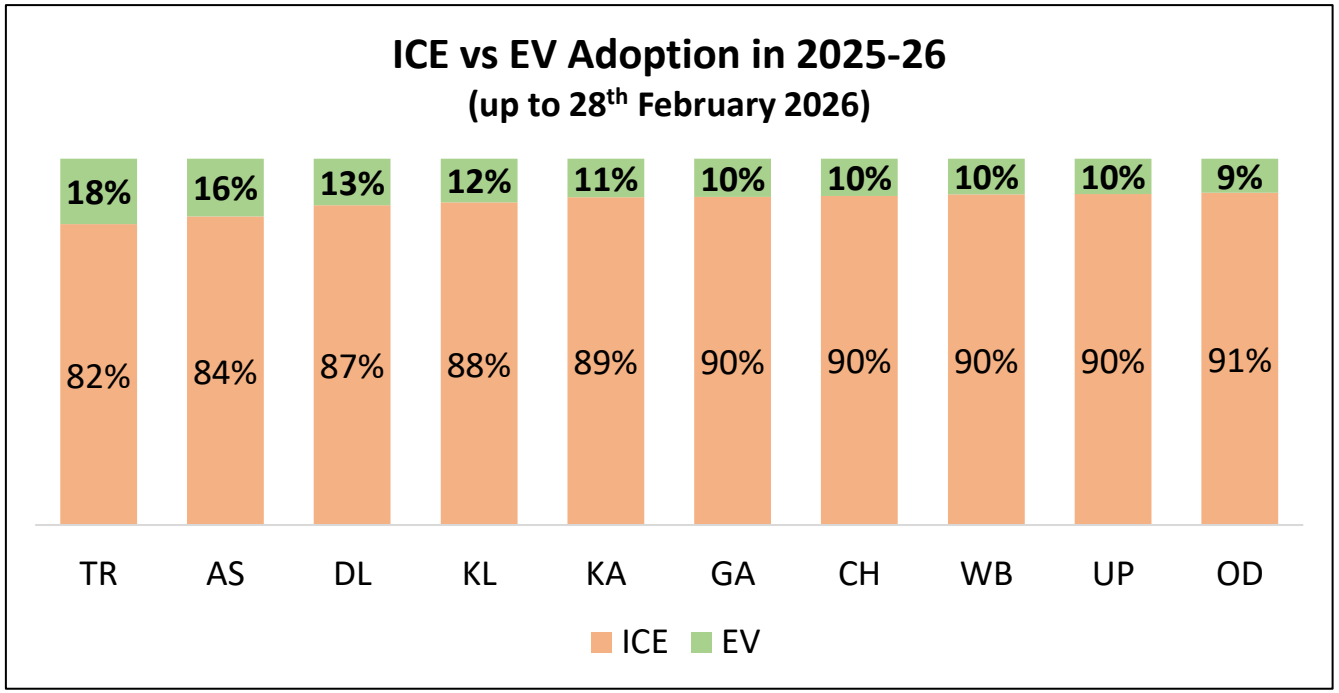


NOTE: The registered number of Electric Vehicles includes Electric BOV, Plug-in Hybrids, and Pure EVs.

Source: VAHAN Dashboard

Status of Electric Mobility in India





NOTE: AS- Assam, CH- Chandigarh, GA- Goa, OD- Odisha, TR- Tripura, WB- West Bengal

Source: VAHAN Dashboard

Recent Interventions to promote Renewable Energy

Solar

Under the PLI scheme, the GOI has announced INR 19,500 crores to incentivize the manufacturing of domestic solar PV modules.

PM-Surya Ghar: Muft Bijli Yojana relaesed with a total outlay of Rs. 75,021 crore for installing rooftop solar (RTS) for one crore households. The scheme provides a CFA of Rs 30,000 for a 1 kW RTS system, Rs 60,000 for a 2kW RTS system, and Rs 78,000 for a 3kW RTS system.

The inter-state transmission charges are waived for 25 years for the projects being commissioned before 30th June 2025.

The updated RPO compliance supports solar integration of up to 33.57% of the electricity purchased by DISCOMs/states till the year 2029-30.

PM KUSUM projects where PPAs/NTPs are signed on or before 31st March 2025 only, it is decided to provide the extension of timelines till 31st March 2027.

Wind

Reverse auctions have been scrapped for wind projects. A traditional two-part (technical and financial) bid system has been put in place.

To support off-shore wind, SECI will invite bids for up to 4GW to set up offshore wind plants off the coast of Tamil Nadu and Gujarat.

The ISTS charges are waived for 25 years for the onshore projects being commissioned before 30th June 2025 and for off-shore projects on or before 31st December 2032.

The updated RPO compliance supports WIND integration of up to 6.94% of the electricity purchased by DISCOMs/states till the year 2029-30.

The National Repowering & Life Extension Policy for Wind Power Projects- 2023, for wind power projects is released for the optimum utilization of wind energy resources by maximizing energy (kWh) yield per sq. km of the wind project areas.

The GoI has decided to invite bids for 50 GW of RE annually, which includes up to 10 GW of wind capacity.

Energy Storage

Ministry of Power has released the guidelines for the development of PSP with the target of 26.7 GW of PSP and 47.2 GW of BESS to integrate with RE capacity till 2032.

PLI scheme unveiled for setting up 50 GWh ACC battery storage with an outlay of ₹18,100 crores.

Under the Waste Management Rules 2022, the disposal of waste batteries in landfills and incineration is prohibited and the recycling of waste batteries is made mandatory.

CERC, under RRAS regulation, has allowed the use of energy storage in secondary and tertiary ancillary support.

CERC has issued a draft second amendment to the Tariff Regulations,2024, proposing a dedicated tariff framework for integrated energy storage systems (ESS) paired with coal, lignite, or gas-based plants and ISTS.

The Energy Storage Obligation of DISCOMs is pegged at 4.0% up to 2029-30.

In India, approximately 10.62 GW of solar capacity coupled with 12.52 GWh of BESS has been tendered as of April 2025.

Green Hydrogen (H_2)

National Green Hydrogen Mission (NGHM) aims to meet the target of 5 million metric tonnes of green hydrogen production by 2030. The initial outlay for the Mission will be INR 19,744 crores. NGHM portal to track the recent initiatives and developments.

India's first Green Hydrogen Hub to be build in Andhra Pradesh by NTPC at an estimated cost of ₹1.85 Lakh Crore with a capacity of producing 1500 TPD Green Hydrogen and 7500 TPD Green Hydrogen derivative

MNRE has sanctioned pilot projects on Hydrogen Fuelled Buses and Trucks consisting total of 37 vehicles and 9 hydrogen refueling stations.

MNRE has sanctioned 3 pilot projects in steel sector for use of green Hydrogen in steel production to be commissioned in next 3 years with total financial outlay of ₹347 Crore from GoI.

Indian Railways to run 35 Hydrogen trains under "Hydrogen for Heritage" at an estimated cost of ₹ 80 crores per train and ground infrastructure of ₹ 70 crores per route on various heritage/hill routes.

Recent Key Highlights or Announcements

- India and the United Kingdom have launched the India–UK Offshore Wind Taskforce under the India–UK Vision 2035 and the 4th Energy Dialogue to provide strategic leadership and coordination for India's offshore wind ecosystem. The initiative focuses on three key pillars:
  - Ecosystem planning and market design (including improved seabed leasing frameworks and reliable revenue mechanisms);
  - Infrastructure and supply chains (such as port modernisation, local manufacturing, and specialised vessels); and
  - Financing and risk mitigation through blended finance approaches and mobilisation of long-term institutional capital.

- The Ministry of Ports, Shipping & Waterways has approved a ₹797.17 crore project to develop a dedicated jetty at Paradip Port for handling green hydrogen, ammonia, and other liquid cargo on a build-operate-transfer basis. With a capacity of 4 MTPA, the project will strengthen the port's role as a hub for green energy cargo. The infrastructure will include a dedicated jetty, storage systems, pipelines, handling equipment and associated facilities.

- The Government of India has notified the Electricity (Amendment) Rules, 2026 to streamline Captive Generating Plants (CGPs), enhance ease of doing business, and support clean energy adoption. The amendments clarify ownership norms, simplify group captive structures, and introduce a uniform verification mechanism, encouraging industries to access reliable and cost-effective power.

Recent Key Highlights or Announcements

- The Ministry of New and Renewable Energy is implementing the PM Surya Ghar Muft Bijli Yojana to install rooftop solar systems in one crore households by 2026-27. Since its launch in February 2024, over 26.20 lakh installations (9.57 GW) have been completed as on 19 March 2026, with ₹17,967.53 crore disbursed as Central Financial Assistance (CFA), supporting clean energy adoption and job creation.

- Shri Manohar Lal, Union Minister for Power, inaugurated the Indian Carbon Market Portal (www.indiancarbonmarket.gov.in) at the Prakriti 2026 conference in New Delhi. The portal will serve as a central platform for implementing and administering a transparent and credible Indian carbon market.

- At the Bharat Electricity Summit 2026 inaugural session, the Ministry of Power and CEA released key strategic reports, including the **National Generation Resource Adequacy Plan (2026-27 to 2035-36)** and the **Transmission Plan for Integration of over 900 GW Non-Fossil Fuel Capacity by 2035-36**. The plans project India's installed capacity to reach ~1121 GW by 2035-36 (with ~786 GW from non-fossil sources, including ~664 GW solar and wind) and outline major transmission expansion—1.37 lakh ckm lines and 8.27 lakh MVA capacity with ₹7.93 lakh crore investment—to ensure reliable power supply and seamless renewable integration.

Vasudha Foundation

D-2, 2nd Floor, Southern Park Mall,
Saket District Court, New Delhi - 110017, India
Tel/fax: + 91-11-2437-3680

Visit us at http://www.vasudha-foundation.org/

For more information about Vasudha Foundation, email us at

info@vasudhaindia.org