

India's Energy Overview

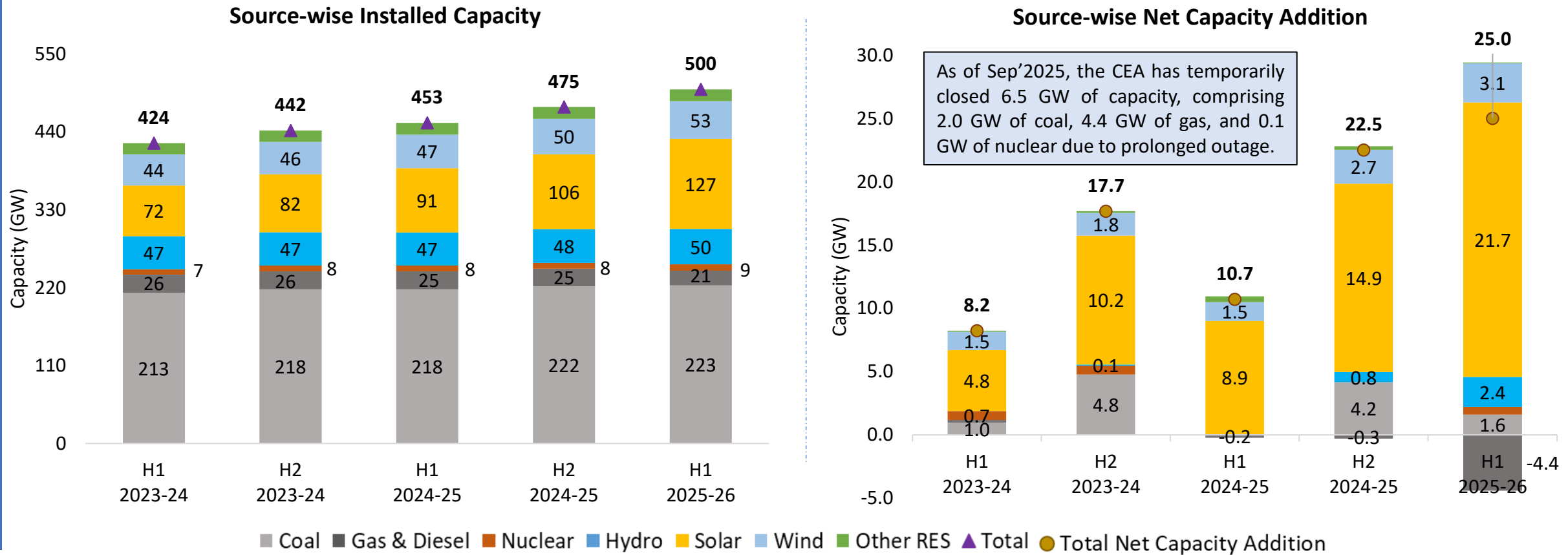
Half-Yearly Highlights of 2025-26



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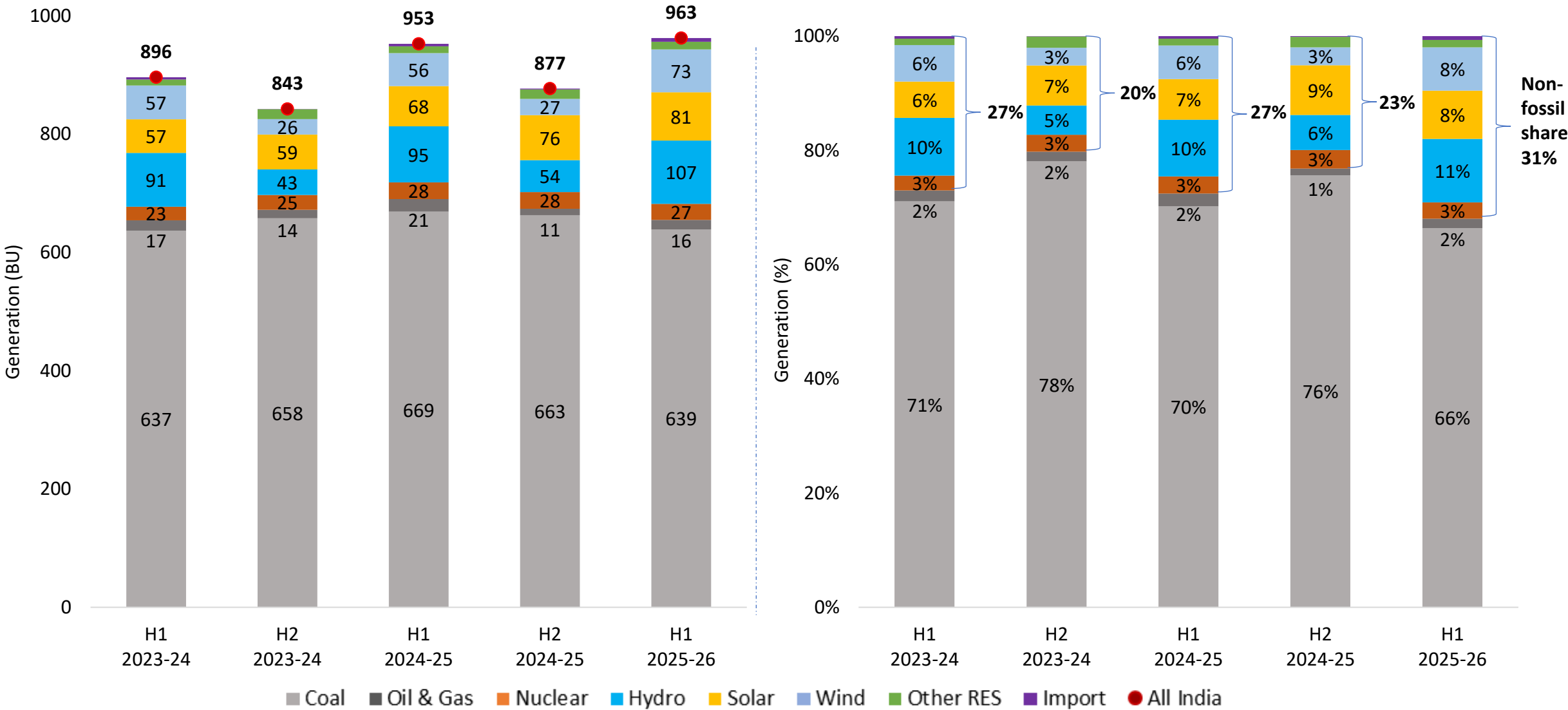
India's Electricity Capacity Mix (Utility-scale)



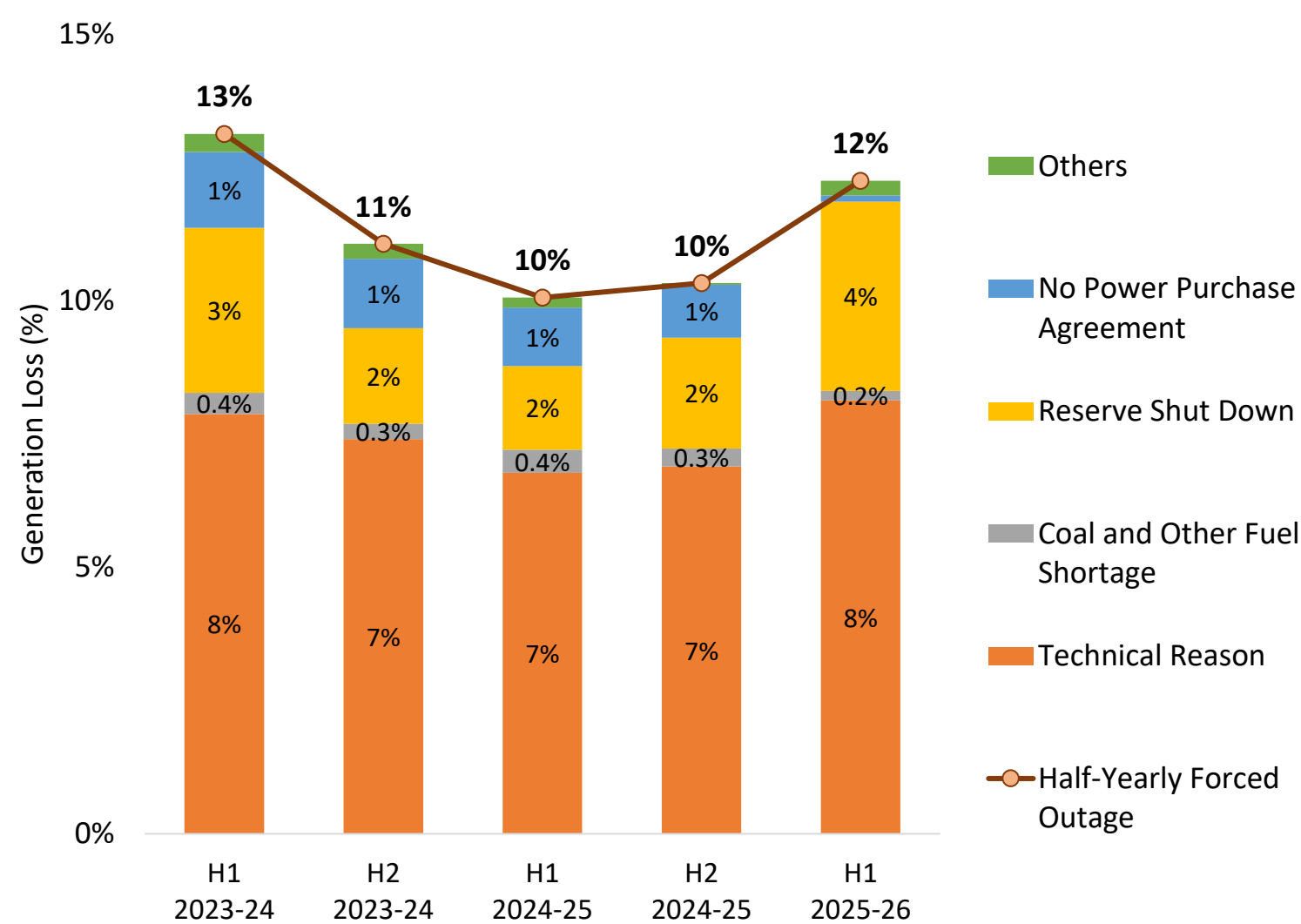
- The share of non-fossil generating capacity in the total installed capacity has increased from 44% in H1 2023-24 to 51% in H1 2025-26.
- The net solar capacity addition in H1 2025-26 has increased by 142% compared to its capacity in H1 2024-25, while wind capacity has increased by 109% during the same period.

India's Electricity Generation Mix

Source-wise Generation Mix

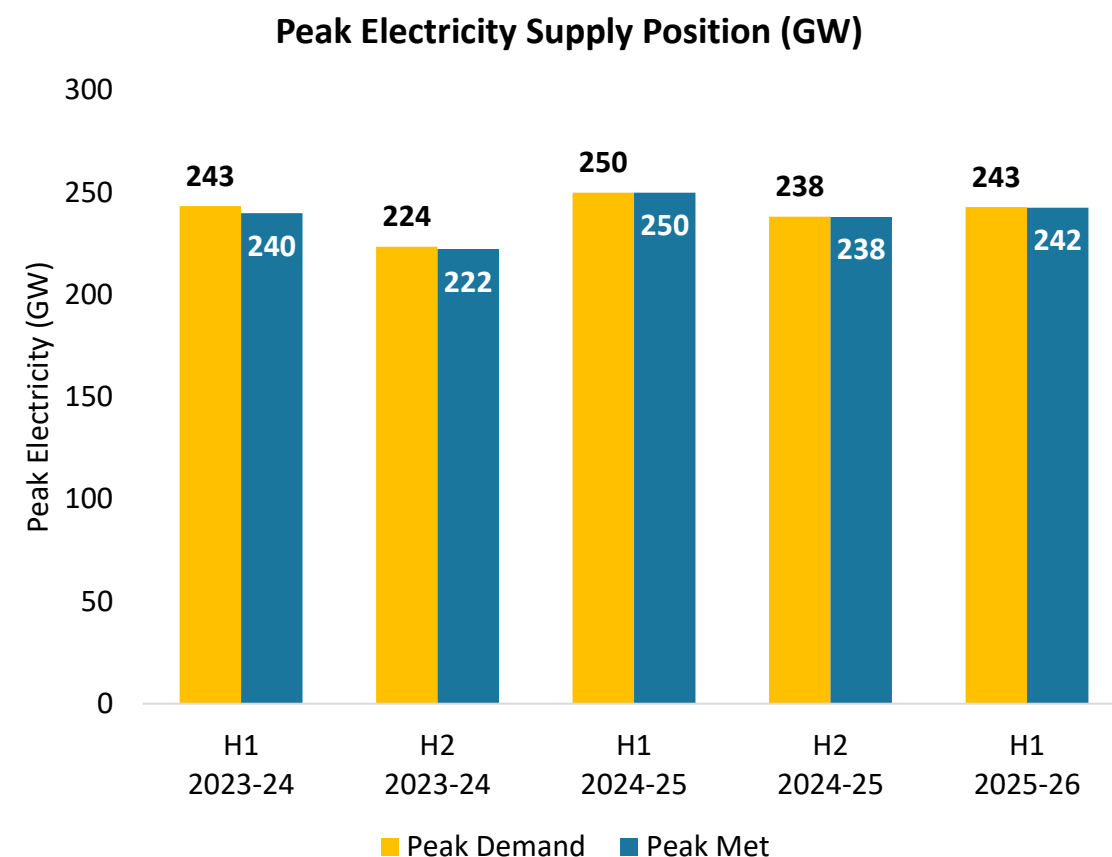
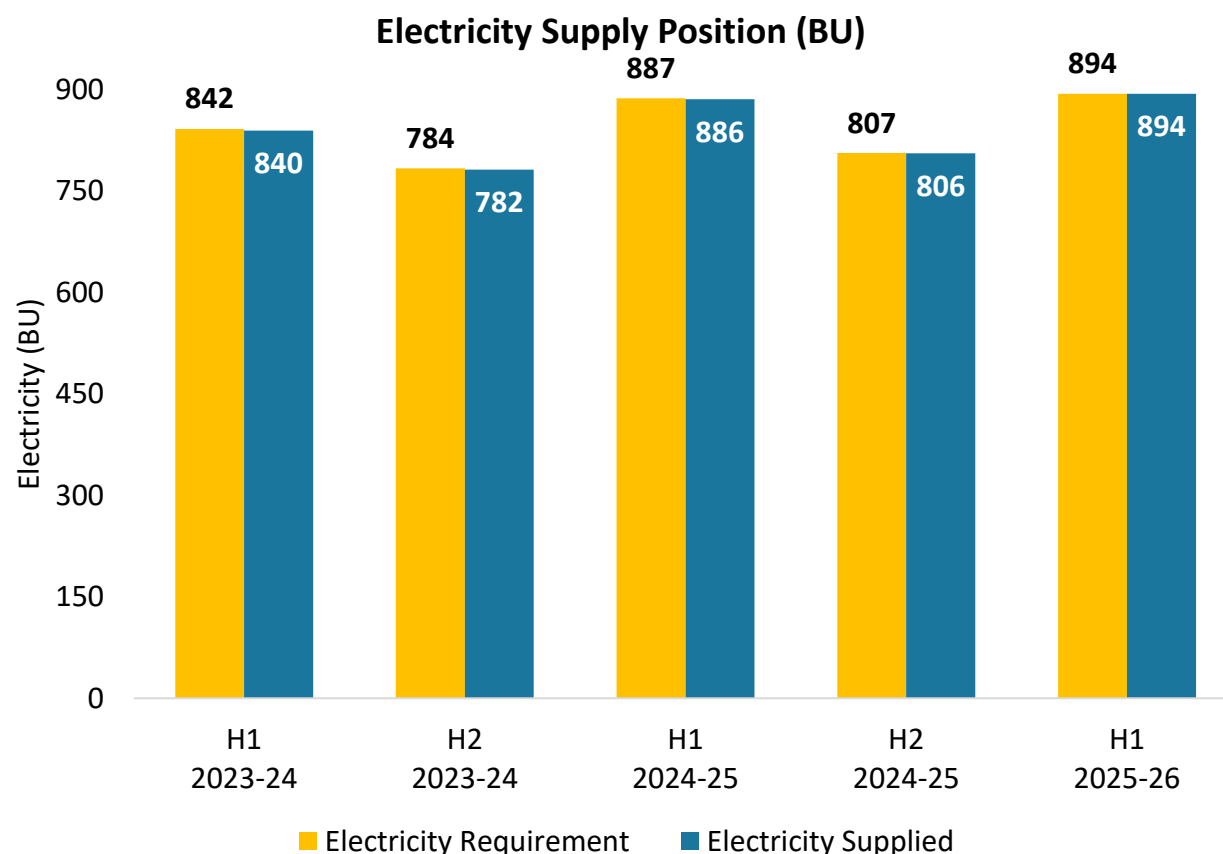


Thermal Generation Loss and Reasons for Forced Outages



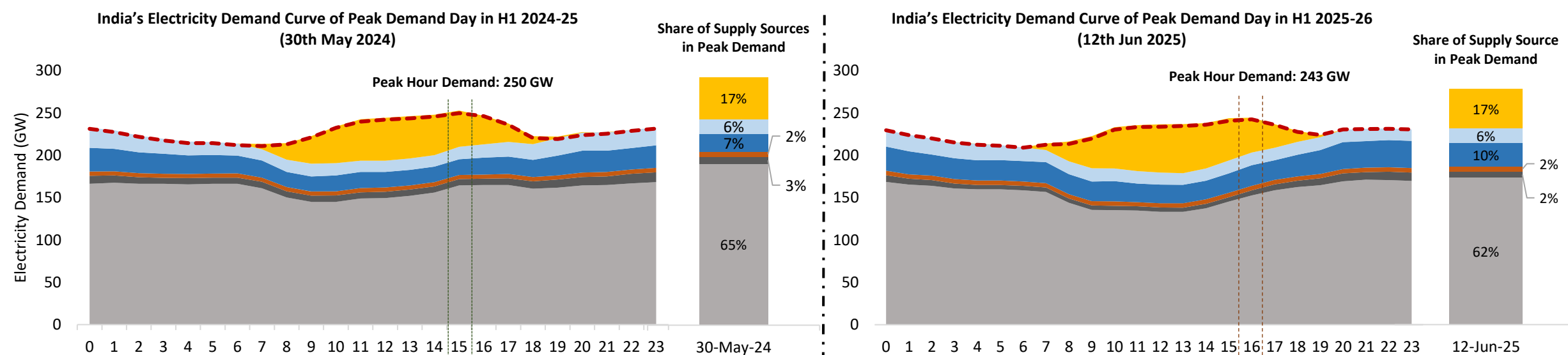
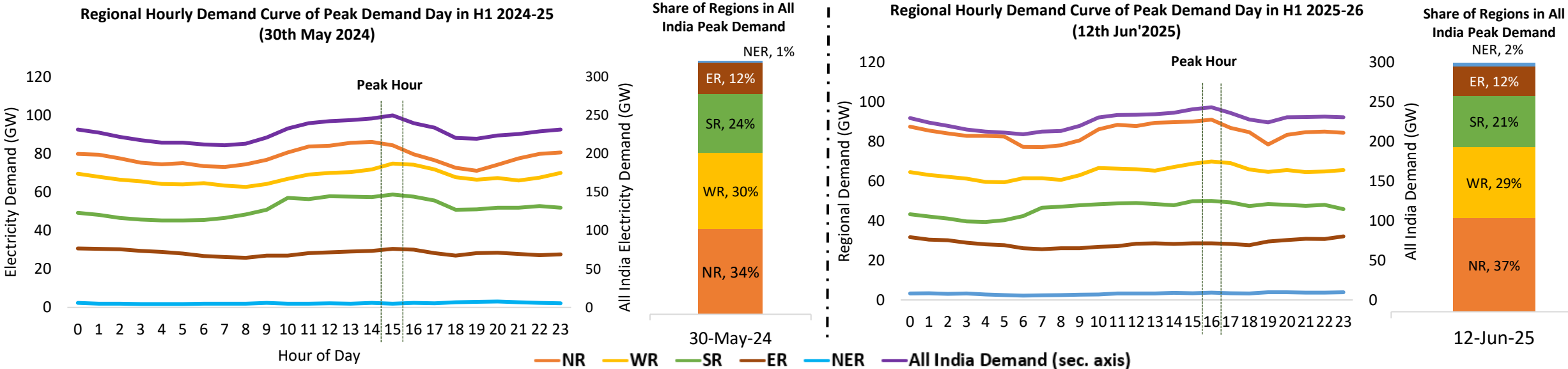
Year/ Half-Yearly		Average Forced Outage Share
Yearly	FY 2023-24	12%
	FY 2024-25	10%
	FY 2025-26 (up to Sep'2025)	12%
Half-Yearly	H1 2023-24	13%
	H2 2023-24	11%
	H1 2024-25	10%
	H2 2024-25	10%
	H1 2025-26	12%

National Electricity Demand and Supply Position

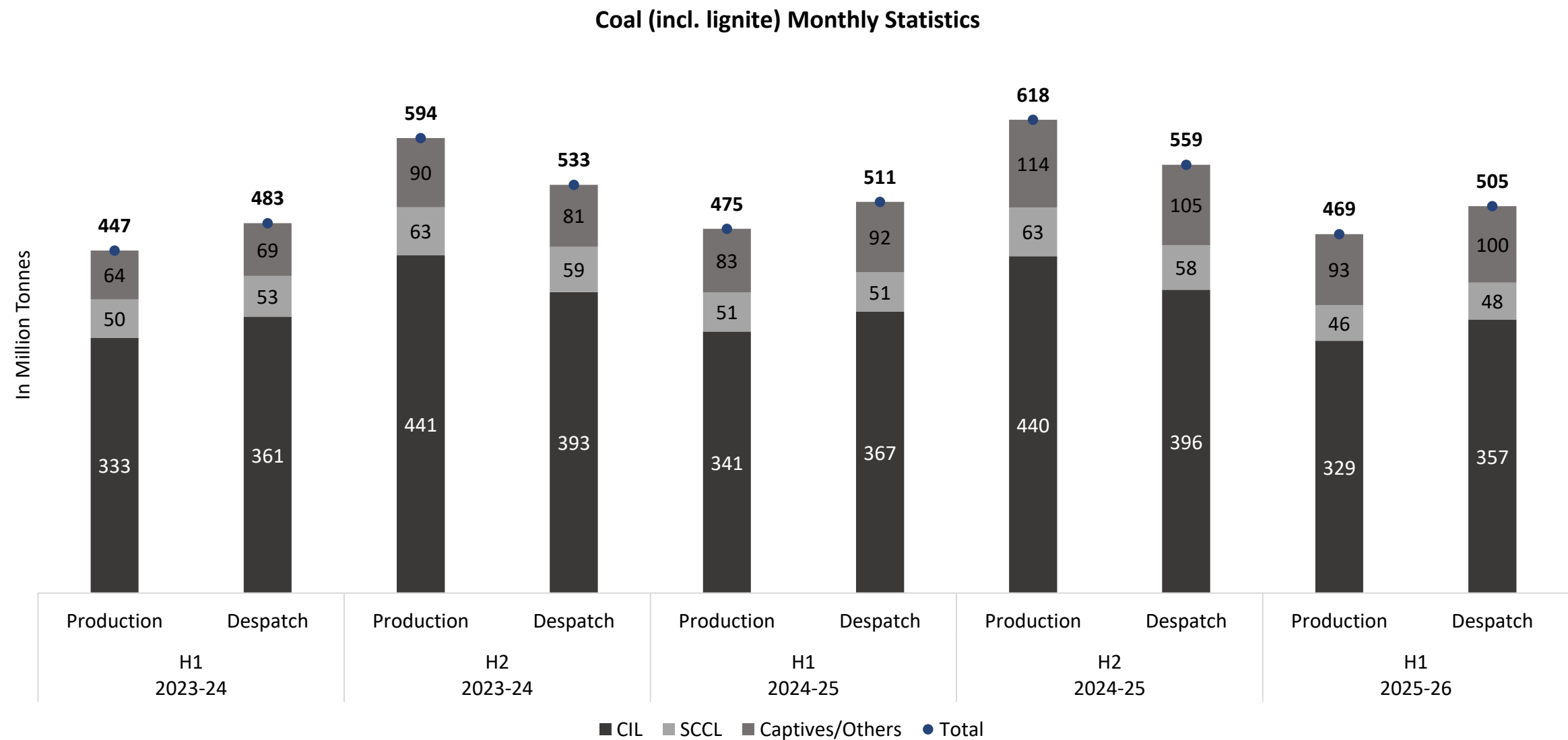


- Grid India forecasted a peak of ~273 GW for H1 FY 2025-26; however, due to cooler temperatures and an early monsoon, the mid-year peak was capped at 243 GW.
- National peak electricity demand in H1 2025-26 has decreased by 3% compared to the peak demand in H1 2024-25.
- National electricity demand in H1 2025-26 increased slightly by 1% compared to the demand in H1 2024-25.

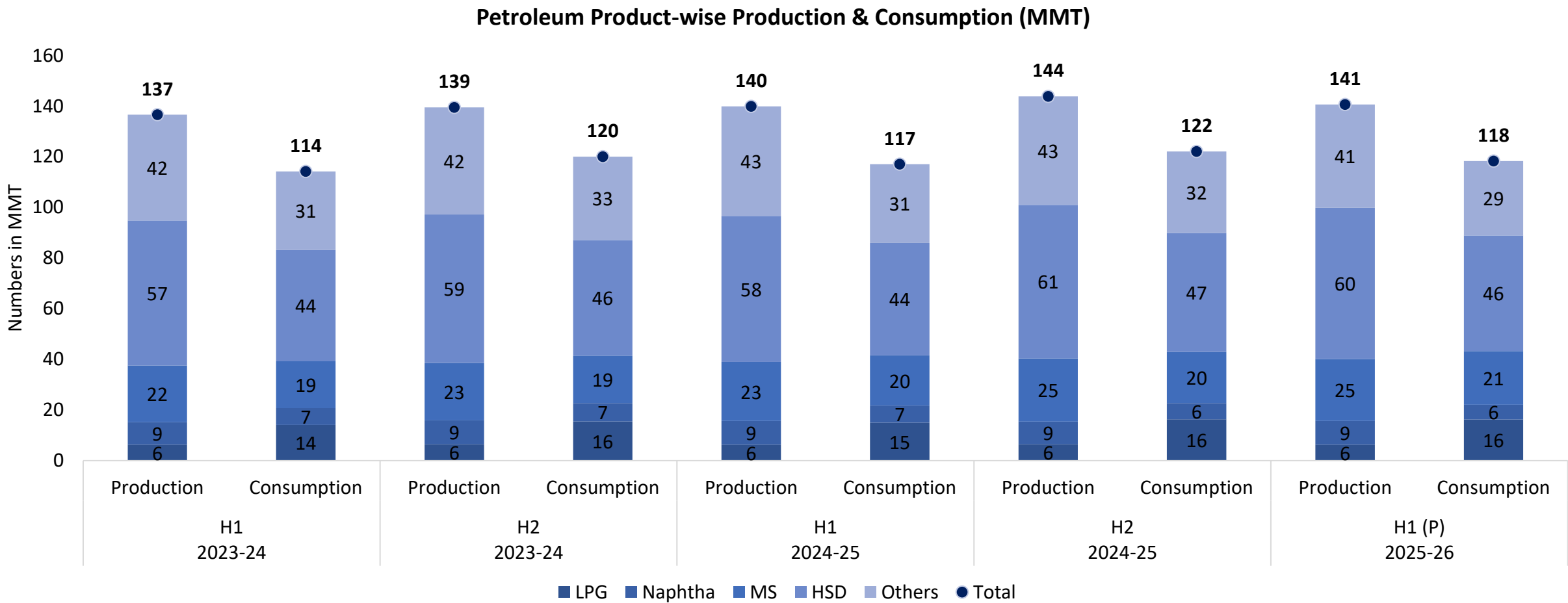
All India, Regional, and Seasonal Electricity Demand Curve of Peak Demand Day



Half-Yearly Coal Statistics



Petroleum Products Market Scenario (1/2)



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

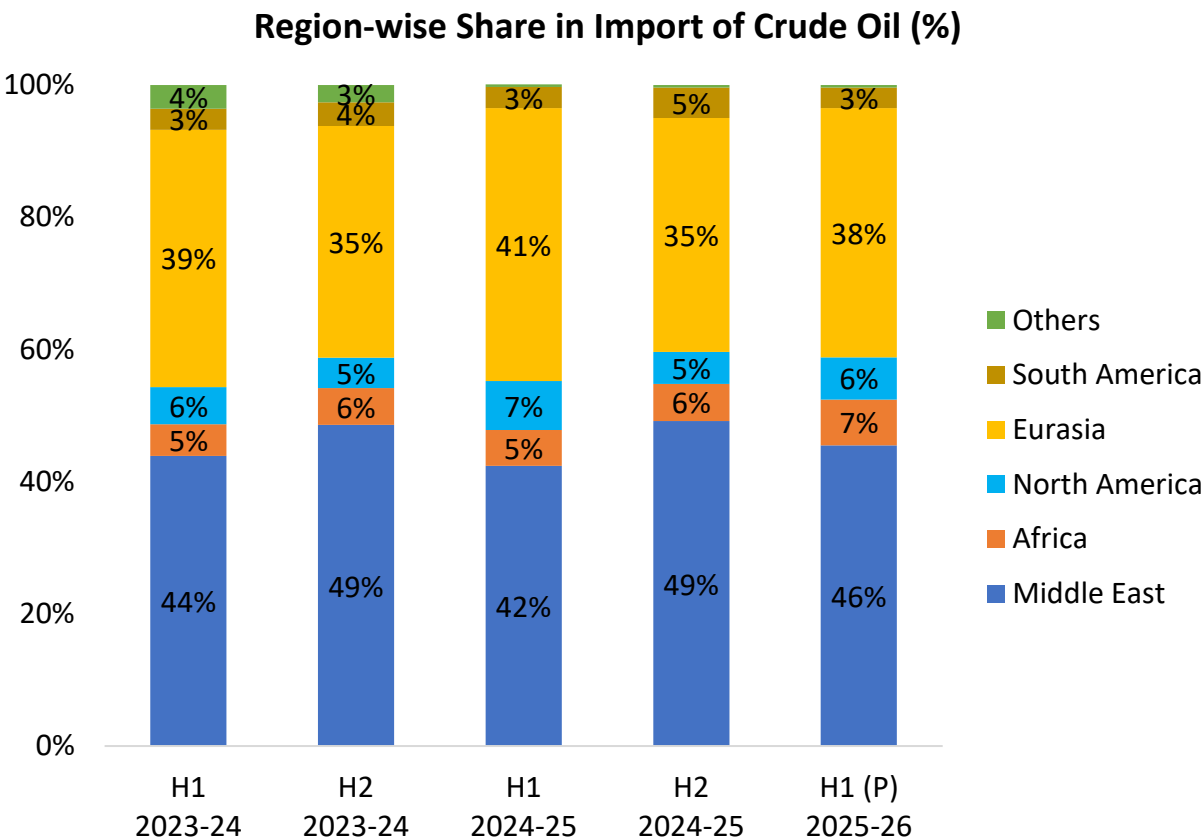
Abbreviations: ATF- Aviation Turbine Fuel, FO- Furnace Oil, HSD- High-Speed Diesel, LDO- Light Diesel Oil, MS- Motor Spirit (Petrol), SKO- Superior Kerosene Oil, LSHS- Low Sulphur Heavy Stock, LPG- Liquefied Petroleum Gas, MMT- Million Metric Tonne, P- Provisional

Petroleum Products Market Scenario (2/2)

Import/Export of Crude Oil and Petroleum Products ('000 Tonnes)						
Petroleum Products	Import/ Export	Half-Yearly				
		H1 2023-24	H2 2023-24	H1 2024-25	H2 2024-25	H1 (P) 2025-26
Crude Oil	Import	115887	117231	120657	122568	121054
	Export	0	0	0	0	0
	Net Import	115887	117231	120657	122568	121054
LPG	Import	8316	10159	9595	11071	10729
	Export	254	271	263	288	281
	Net Import	8062	9888	9332	10783	10448
Diesel	Import	16	27	15	27	14
	Export	13558	14635	12957	15070	12815
	Net Import	-13542	-14608	-12942	-15044	-12802
Petrol	Import	446	271	235	0	0
	Export	7158	6303	7182	8648	7973
	Net Import	-6712	-6032	-6948	-8648	-7973
Others	Import	14582	14852	15001	14959	13974
	Export	9706	10551	11288	9378	9689
	Net Import	4875	4300	3712	5581	4285

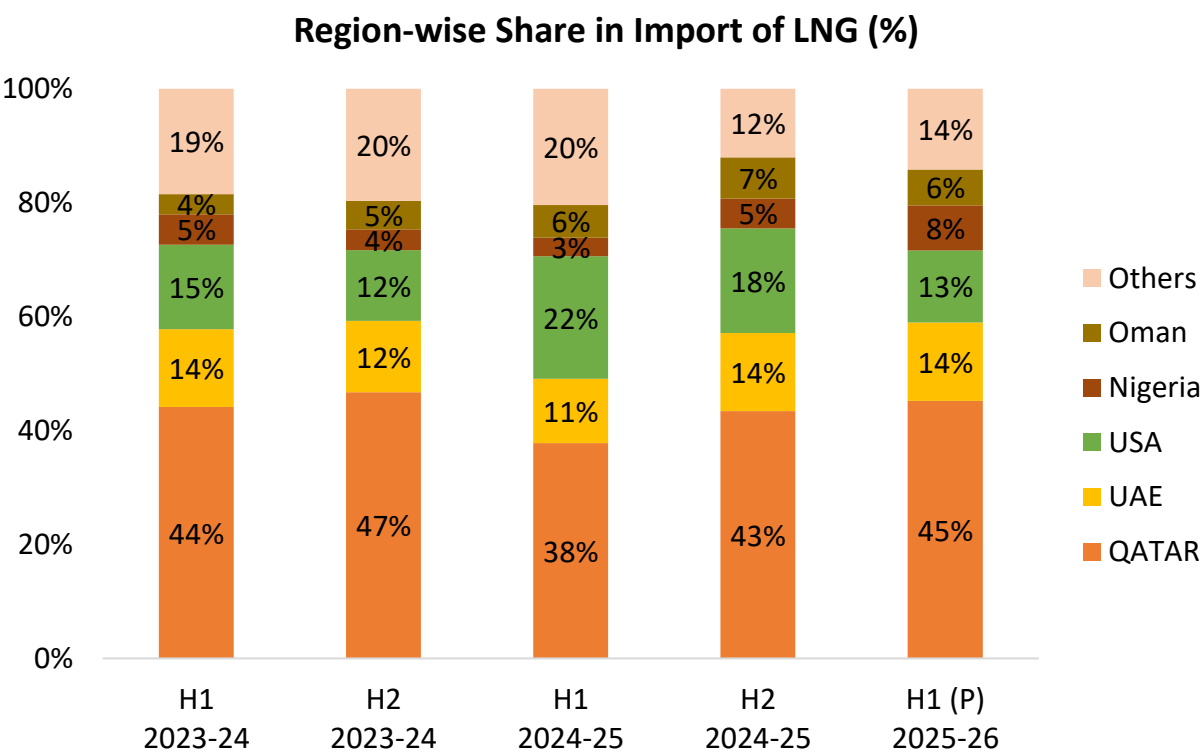
*Others include ATF, Naphtha, SKO, LDO, Lubes, FO, LSHS, Bitumen, pet coke, and others.

Region-wise Oil & Gas Import



Others include- Asia and Europe

Total Import of Crude Oil (MMT)					
Total Import	H1 2023-24	H2 2023-24	H1 2024-25	H2 2024-25	H1 (P) 2025-26
Crude Oil	116	117	121	123	121

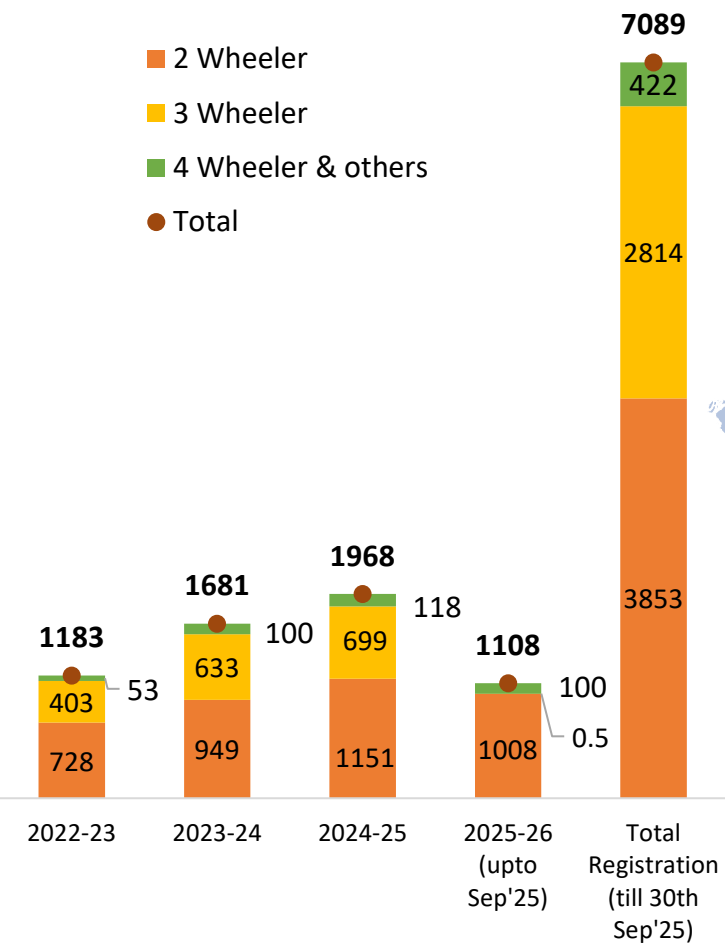


Others include- Cameron, Nigeria, Australia, Equatorial Guinea, Trinidad, Cameroon, Egypt, France, Algeria, Belgium, Indonesia, Turkey, Russia, Spain, Malaysia, Brunei, Netherlands, Norway, and others.

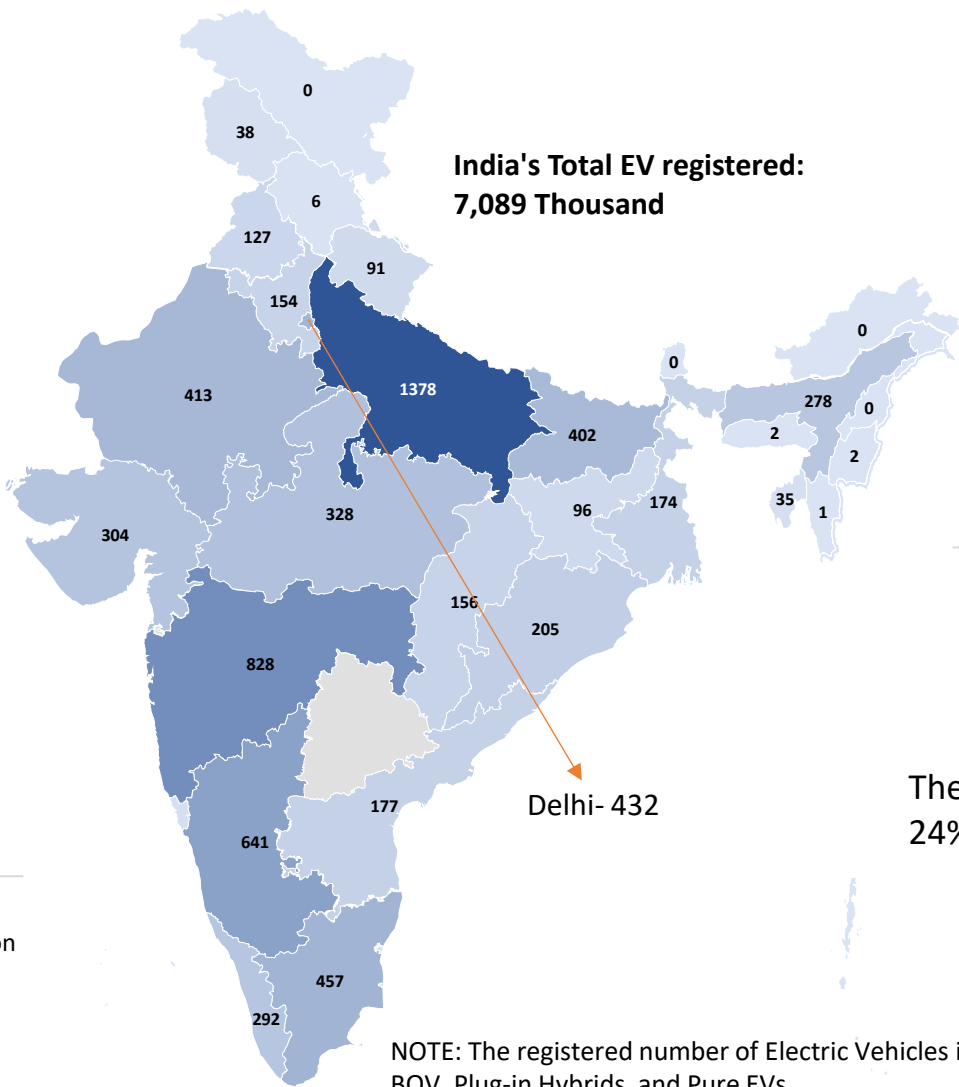
Total Import of Liquefied Natural Gas (LNG) (MMT)					
Total Import	H1 2023-24	H2 2023-24	H1 2024-25	H2 2024-25	H1 (P) 2025-26
LNG	12	12	14	13	13

Status of Electric Mobility in India

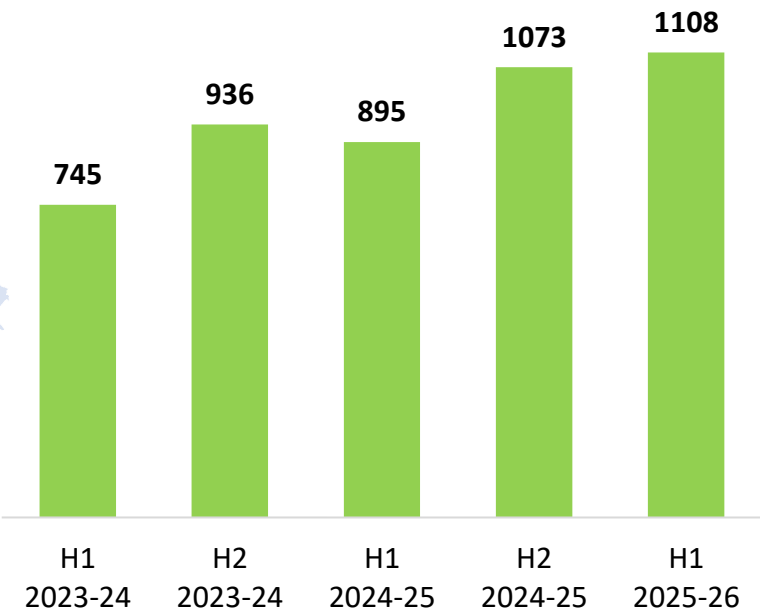
National EV registration
(Number in Thousands)



Cumulative State-wise EV registration
as on 30th September 2025 (in Thousands)



Provisional Half-Yearly EV registered
(in Thousands)



NOTE: H1- April to September, H2- October to March.

The EV registrations in H1 2025-26 have increased by 24% compared to its registrations in H1 2024-25.

Key Policy Highlights and Announcements in H1 2025-26

- The Ministry of New and Renewable Energy has released the [Green Hydrogen Certification Scheme of India](#) under the National Green Hydrogen Mission. The scheme is a foundational step towards creating a robust framework for certifying green hydrogen production and ensuring transparency, traceability, and market credibility. The scheme prioritizes precise emissions reporting, rigorous monitoring, and alignment with international standards, aiming to enhance investor confidence and foster the development of a reliable green hydrogen ecosystem in India.
- The Central Electricity Authority has launched the [STELLAR, a state-of-the-art, totally indigenously developed Resource Adequacy model](#). This model is designed to integrate generation, transmission, and storage expansion planning with demand response. This advanced tool aims to support states in formulating comprehensive Resource Adequacy Plans, aligning with the guidelines issued by the Ministry of Power in June 2023.
- The Ministry of New and Renewable Energy has introduced [amendments in the guidelines for small hydro projects](#). The key amendments are:
 - Projects achieving 80% of projected generation in any single corresponding month (as per DPR) will receive the full balance CFA.
 - If the 80% target isn't met, the second CFA installment will be reduced proportionally
 - Grace Period & Penalties: a. 12-month grace period for commissioning (from scheduled date); b. Further delays attract 5% reduction per quarter (max 50% cut from second installment); c. Projects must be completed within 5 years (extensions possible with MNRE approval).
- On 9th June 2025, the Ministry of Power launched an [additional Viability Gap Funding \(VGF\) scheme for 30 GWh of Battery Energy Storage Systems](#) (BESS), with a total outlay of ₹5,400 crore from the Power System Development Fund. This follows the 2023 scheme for 13.2 GWh, highlighting the growing policy push to scale up energy storage infrastructure.
- On 31st July 2025, the Union Minister of Ports, Shipping & Waterways, Shri Sarbananda Sonowal, inaugurated a [1 MW Green Hydrogen Power Plant at the Deendayal Port Authority \(DPA\), Kandla](#). With an annual production capacity of around 140 metric tonnes of green hydrogen, the facility is set to play a pivotal role in advancing maritime decarbonisation and promoting sustainable port operations.

Key Policy Highlights and Announcements in H1 2025-26

- The Ministry of New and Renewable Energy (MNRE) has issued [revised guidelines for the Biomass Programme under Phase-I of the National Bioenergy Programme, applicable for the period FY 2021-22 to 2025-26](#). The amendments aim to promote clean energy, streamline processes, and boost biomass adoption. Key highlights include:
 - Integration of IoT-based monitoring or quarterly data submissions as a cost-effective alternative to SCADA systems.
 - Simplified documentation for briquette and pellet manufacturers, reducing approval timelines.
 - Replacement of the mandatory two-year sales contract with a more flexible general sale agreement.
 - A performance-based subsidy mechanism where projects operating above 80% efficiency receive full CFA, and those below receive it on a pro-rata basis.
- The [Ministry of Environment, Forest and Climate Change has signed a Memorandum of Cooperation \(MoC\) with Japan on the Joint Crediting Mechanism \(JCM\)](#) under Article 6.2 of the Paris Agreement. The MoC aligns with the Indo-Japan priority of “Green Energy Focus for a Better Future”. The agreement strengthens collaboration between India and Japan on climate change mitigation, with low-carbon technologies approved by the National Designated Agency for Implementation of Article 6 (NDAIAPA) playing a key role in India’s long-term low-carbon development pathway towards achieving Net Zero by 2070.
- Bureau of Energy has released [three new draft methodologies for public consultation under its domestic carbon market](#). This comes after the country approved eight methodologies under the mechanism, known as Carbon Credit Trading Scheme (CCTS), in March. The new methodologies for offset mechanism are:
 - electricity and heat generation from biomass;
 - production of compressed bio-gas;
 - emission reduction through improved management practices in rice cultivation.
- The Ministry of New and Renewable Energy (MNRE) has launched [the Innovative Projects Start-Up Challenge on Rooftop Solar and Distributed Renewable Energy](#) to support breakthrough solutions for India’s clean energy sector. Supported by NISE and StartUp India, the challenge offers a prize pool of ₹2.3 crore along with incubation, pilot opportunities, and expert mentorship.

Key Policy Highlights and Announcements in H1 2025-26

- Ministry of Power has initiated a stakeholder survey to develop the [India Energy Stack \(IES\), a digital backbone for India's power sector](#). The IES aims to create a connected, intelligent, and interoperable energy ecosystem. As part of this initiative, a Utility Intelligence Platform will be developed using standardized and open APIs and protocols, in collaboration with selected power distribution utilities. This platform will unlock data from various IT/OT systems to drive innovation and efficiency across the sector.
- The Government of India has [reduced GST on renewable energy components from 12% to 5%](#) will lower project costs, making clean electricity more affordable for households, farmers, industries, and developers. This cut will reduce rooftop solar costs by ₹9,000 to 10,500 per 3 kW System under PM Surya Ghar, save ₹1,750 crore on 10 Lakh Solar Pumps for farmers under PM-KUSUM, boost RE equipment manufacturing by 3-4% cut on Module and Component Costs, and create 5 to 7 lakh green jobs over the next decade.
- The Government of India has launched the [National Policy on Geothermal Energy \(2025\)](#) to harness India's untapped geothermal potential and advance its 2070 Net Zero goal. The policy provides a comprehensive framework for exploration, development, and utilization of geothermal energy for power generation and diverse applications such as district heating, agriculture, and cooling via GSHPs. It emphasizes research, innovation, public-private collaboration, and international partnerships to build a robust geothermal ecosystem. As an initial step, five pilot and resource assessment projects have been sanctioned to evaluate geothermal potential across the country.
- The Ministry of Coal has [raised the GST rate on coal from 5% to 18% while removing the ₹400 per tonne compensation cess](#). Despite the higher GST rate, the overall tax burden has significantly declined, with coal grades G6 to G17 witnessing reductions ranging from ₹13.40 to ₹329.61 per tonne. This reduction is expected to lower power generation costs for the power sector by approximately 17 to 18 paise per unit.



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