

India's Energy Overview

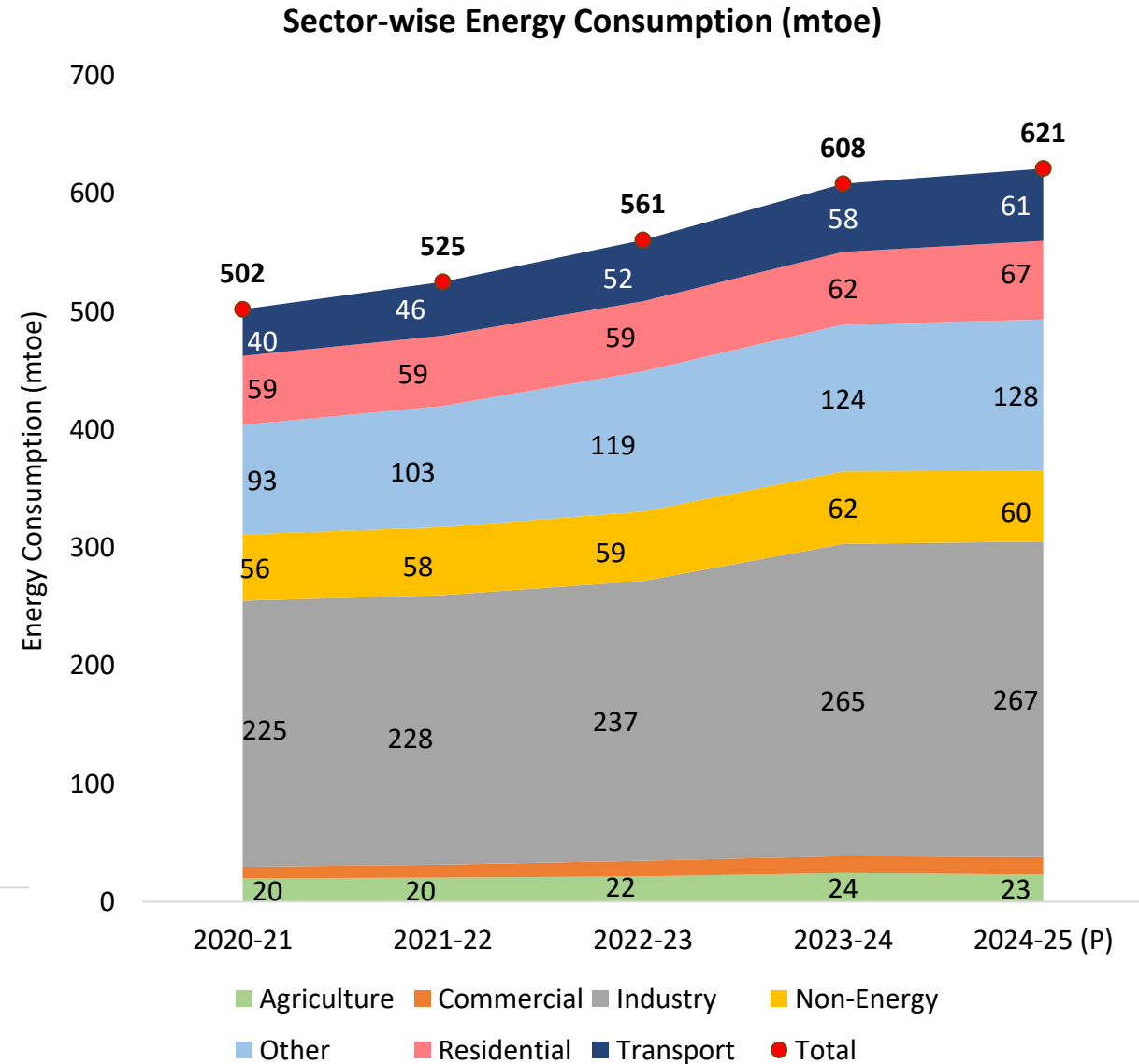
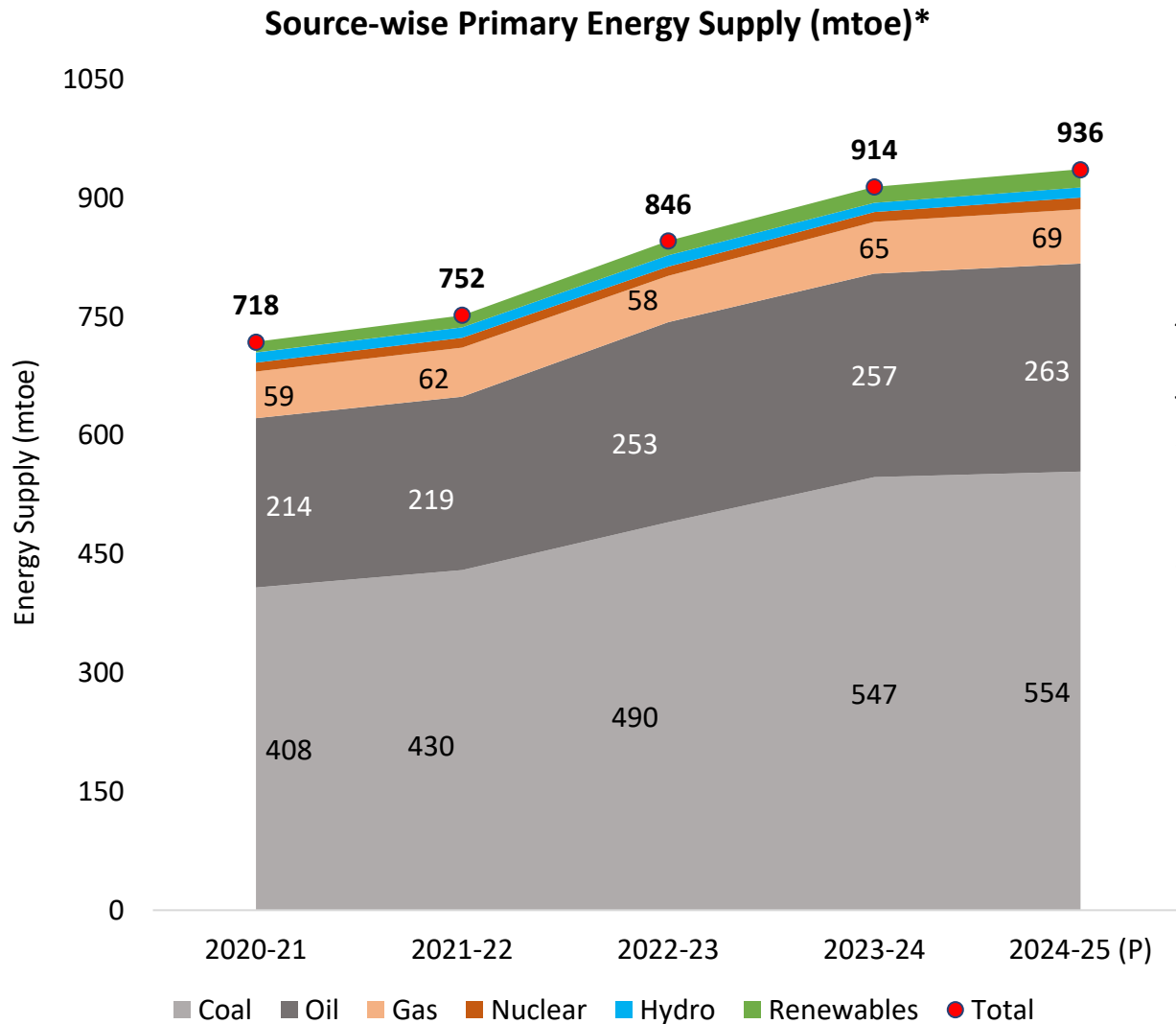
May 2026



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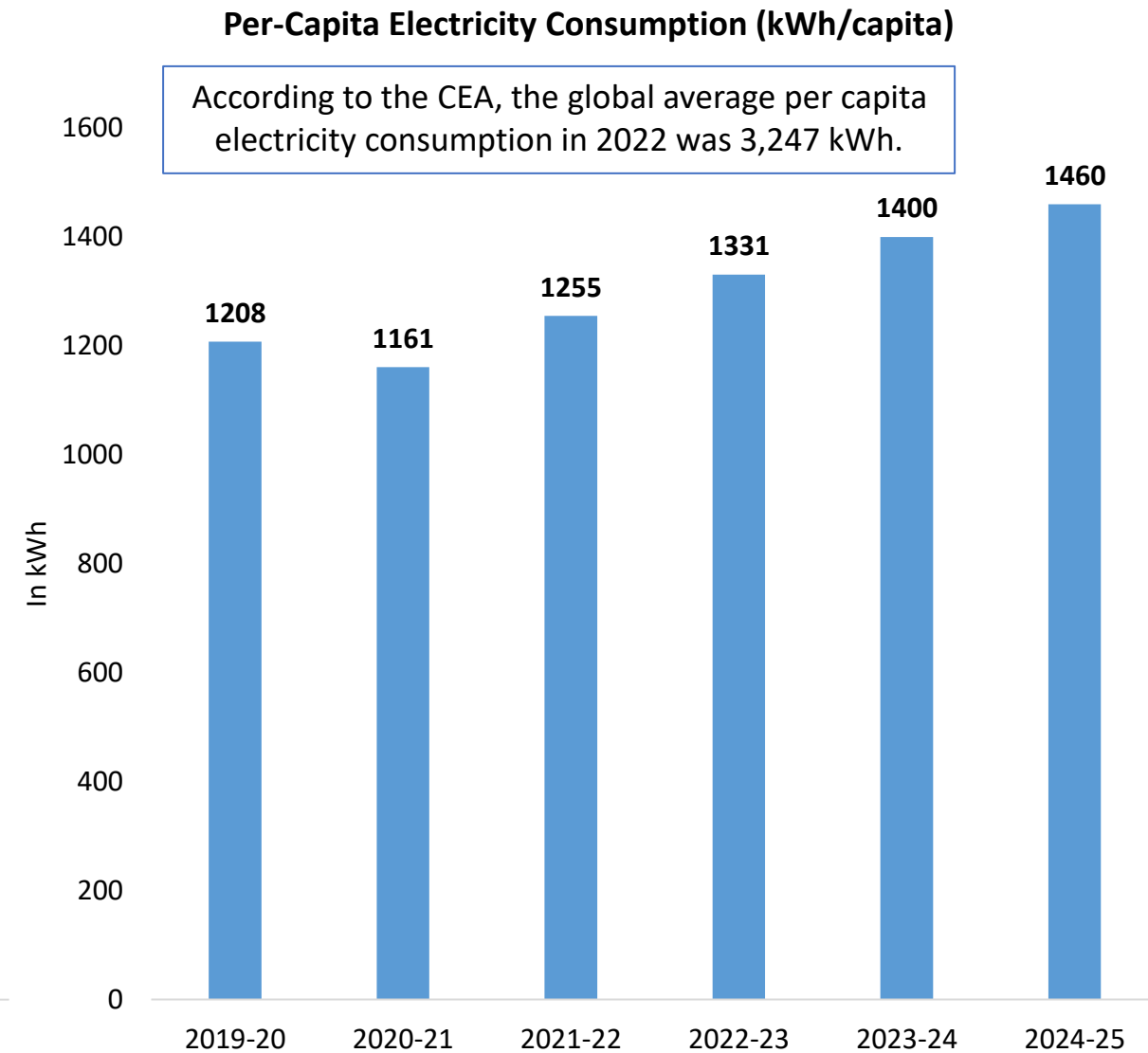
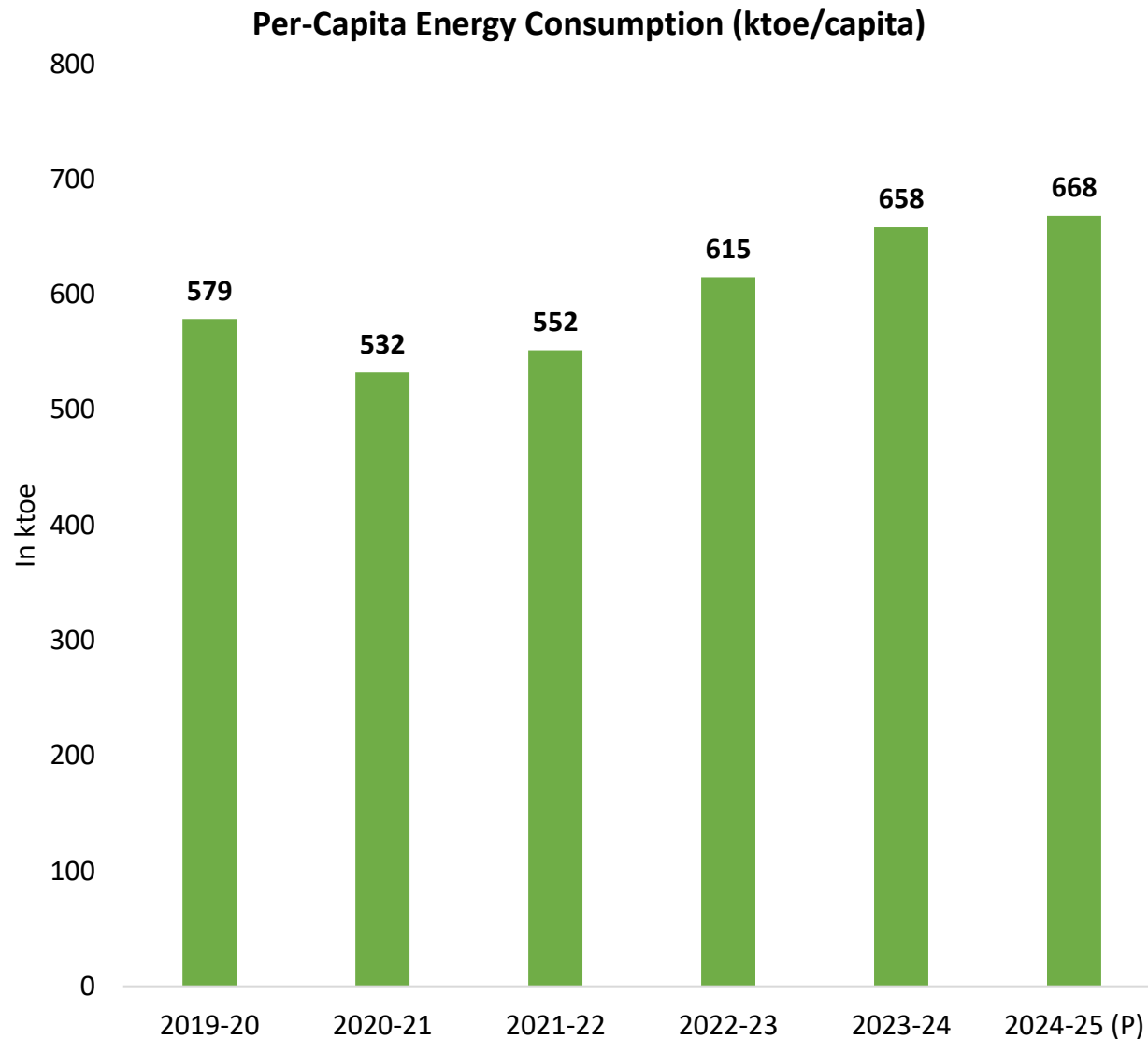
Primary* and Final Energy Mix in India



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

Source: ICED

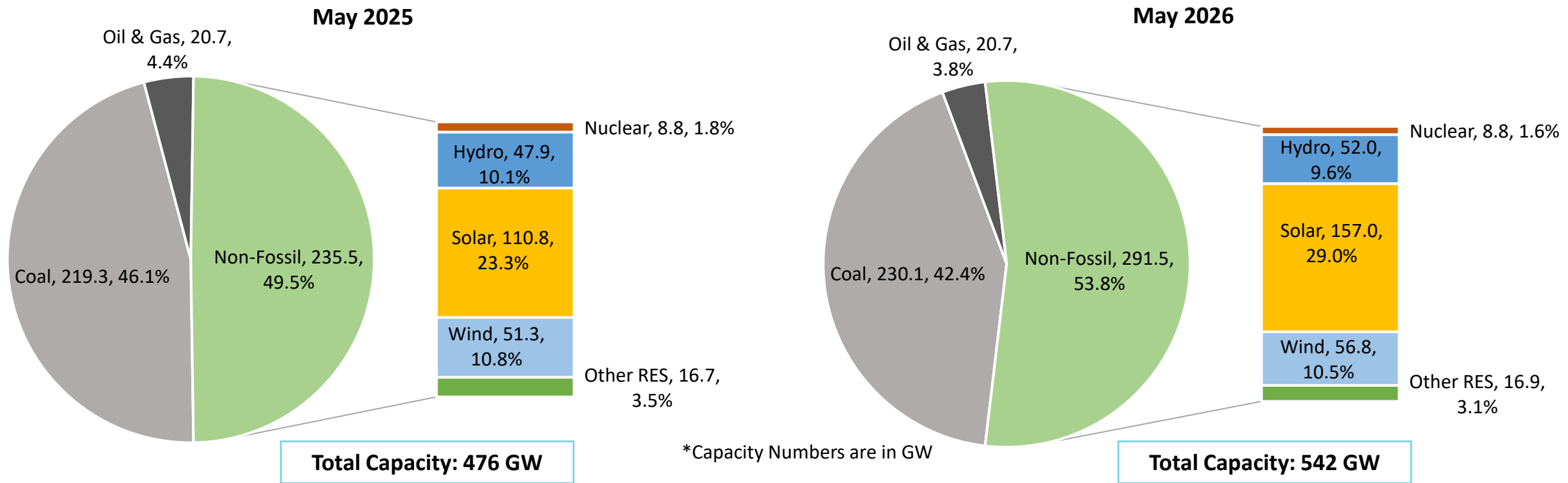
Per-Capita Energy and Electricity Consumption



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

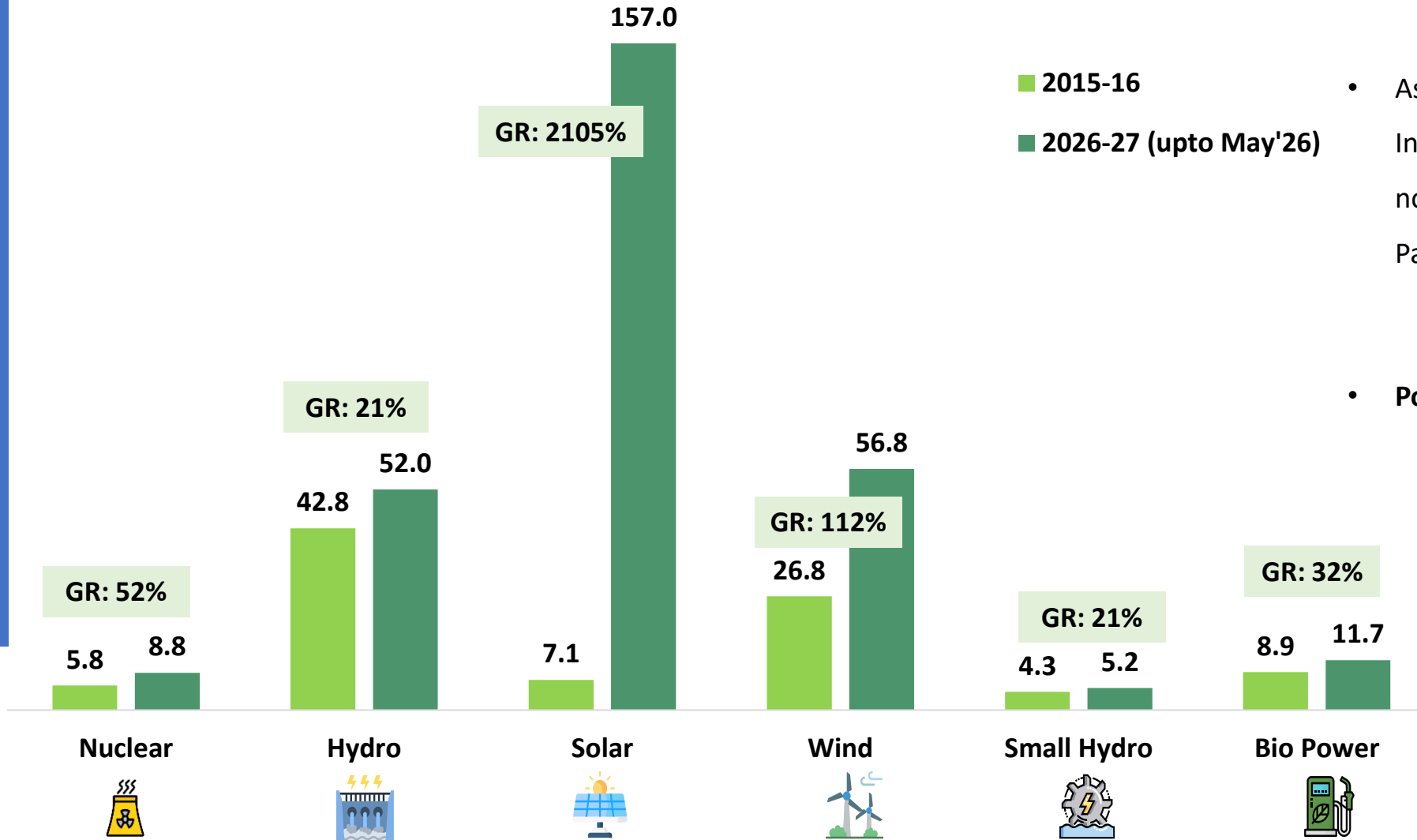
Source: ICED & CEA

India's Electricity Capacity Mix (Utility-scale)



- India's electricity generating capacity is 542 GW as on May'2026 [coal 230 GW (42%), solar 157 GW (29%), wind 57 GW (11%), and hydro 52 (10%)].
- As on May'2026, the share of non-fossil-based electricity capacity is 54% against the updated target of 60% non-fossil capacity by 2035.
- As on May'2026, India's renewable energy capacity (including large hydro) stood at 283 GW out of 542 GW.

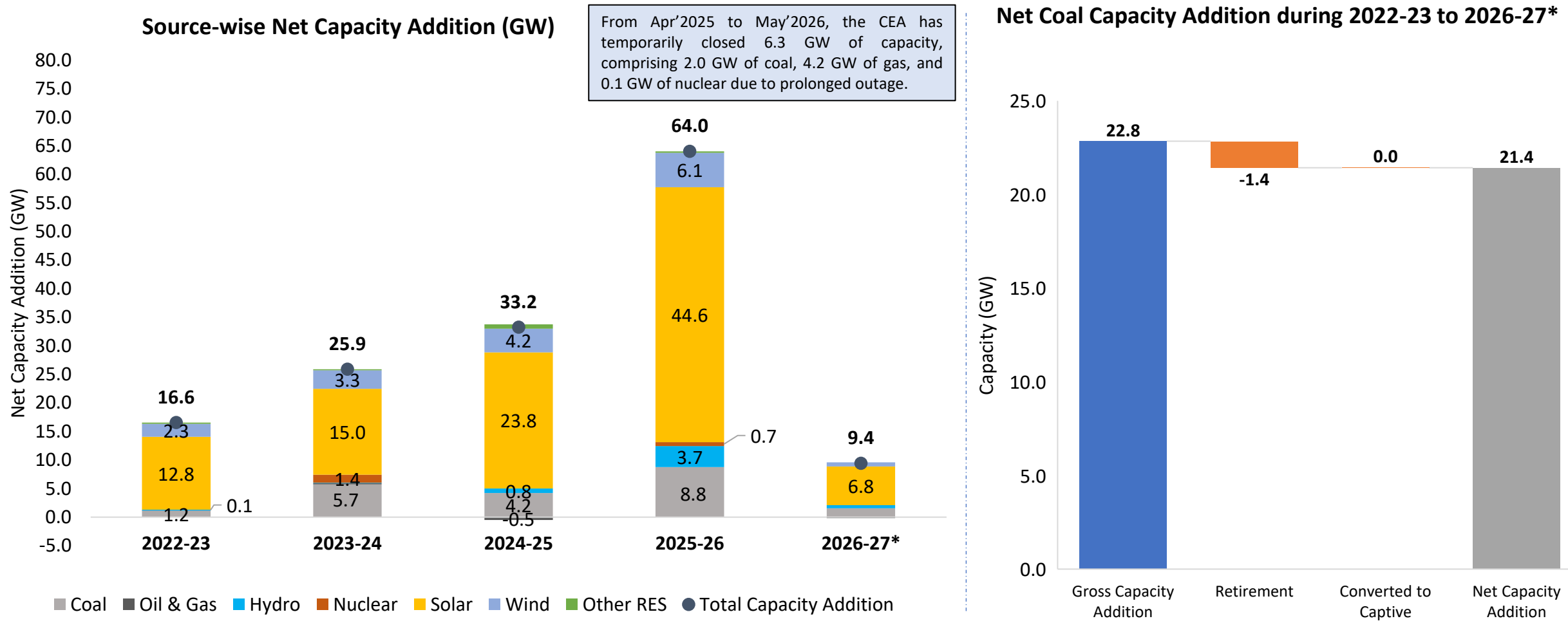
Non-Fossil Energy Capacity (in GW) Growth Post-2015 Paris Agreement



- As of 31 May 2026, **54% (292 GW)** of India's total power capacity (**542 GW**) is now non-fossil fuel-based, meeting the Paris Agreement pledge.

- Post-2015 Paris Agreement Growth:**
 - solar capacity increased **22-folds**
 - wind power **doubled**
 - nuclear increased by **4% CAGR**.

India's Electricity Capacity Addition in last 5 years



- A total of 126 GW of generation capacity has been added in RE (Hydro, solar, wind, and other RES) over the past 5 years (2022-23 to 2026-27*), whereas the net coal capacity addition during the same period was 21 GW, mostly in the central sector.

State-wise Solar Capacity

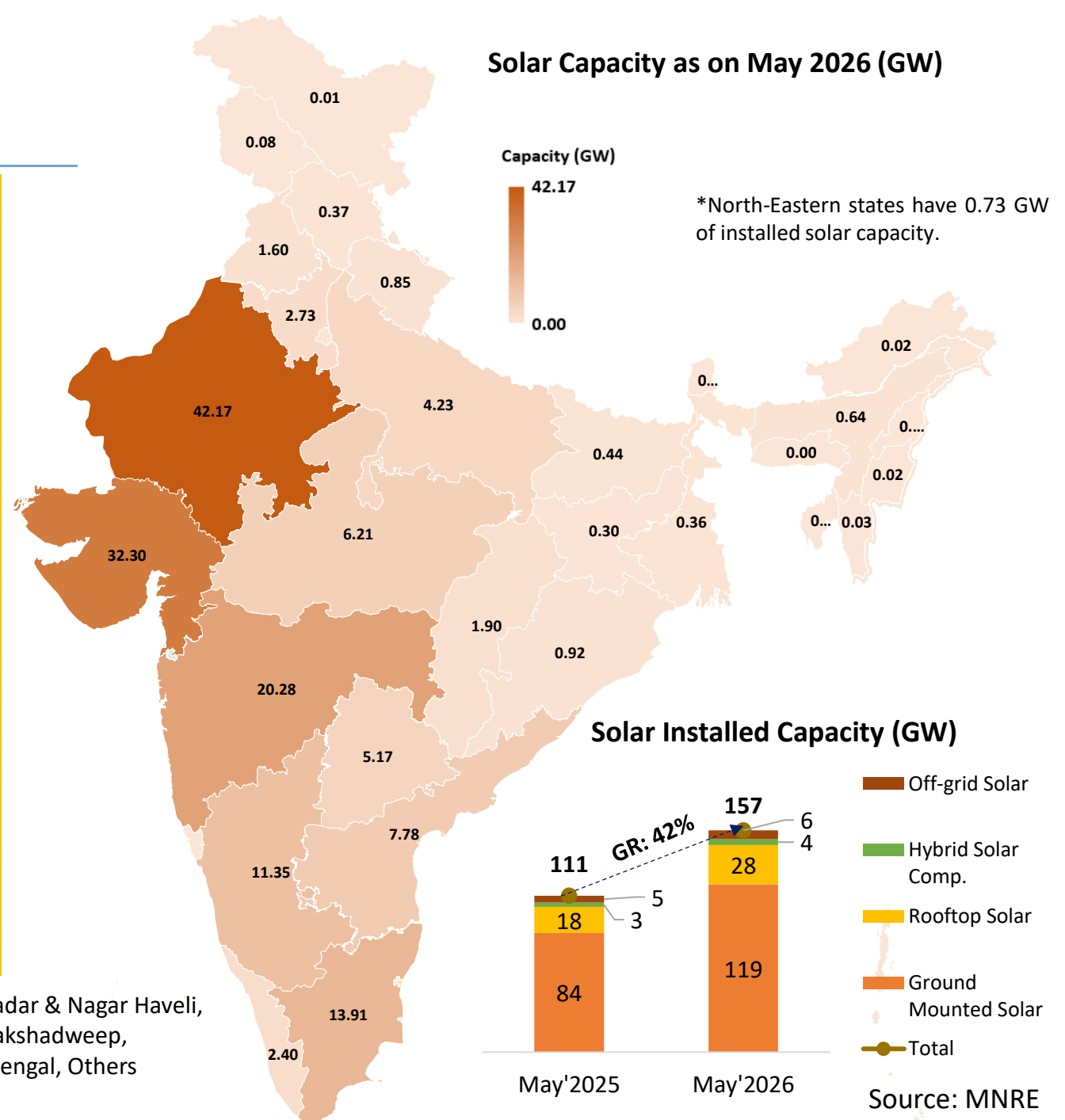
as on May 2026

State-wise Installed Capacity of Solar Power (GW)

States	Ground Mounted	Rooftop	Solar Component in Hybrid	Off Grid	Total Solar Power
Rajasthan	37.06	2.26	1.98	0.87	42.17
Gujarat	23.26	7.41	1.43	0.20	32.30
Maharashtra	12.17	5.97	0.00	2.14	20.28
Tamil Nadu	12.20	1.64	0.00	0.08	13.91
Karnataka	9.94	0.88	0.36	0.18	11.35
Andhra Pradesh	6.54	0.86	0.29	0.09	7.78
Madhya Pradesh	5.08	1.01	0.00	0.12	6.21
Telangana	4.36	0.80	0.00	0.01	5.17
Uttar Pradesh	3.06	0.80	0.00	0.38	4.23
Haryana	0.27	1.26	0.00	1.20	2.73
Kerala	0.34	2.04	0.00	0.02	2.40
Chhattisgarh	1.35	0.17	0.00	0.39	1.90
Punjab	0.89	0.60	0.00	0.12	1.60
Odisha	0.67	0.17	0.00	0.08	0.92
Others	1.63	2.03	0.00	0.43	4.09
All India	118.79	27.88	4.06	6.31	157.05

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

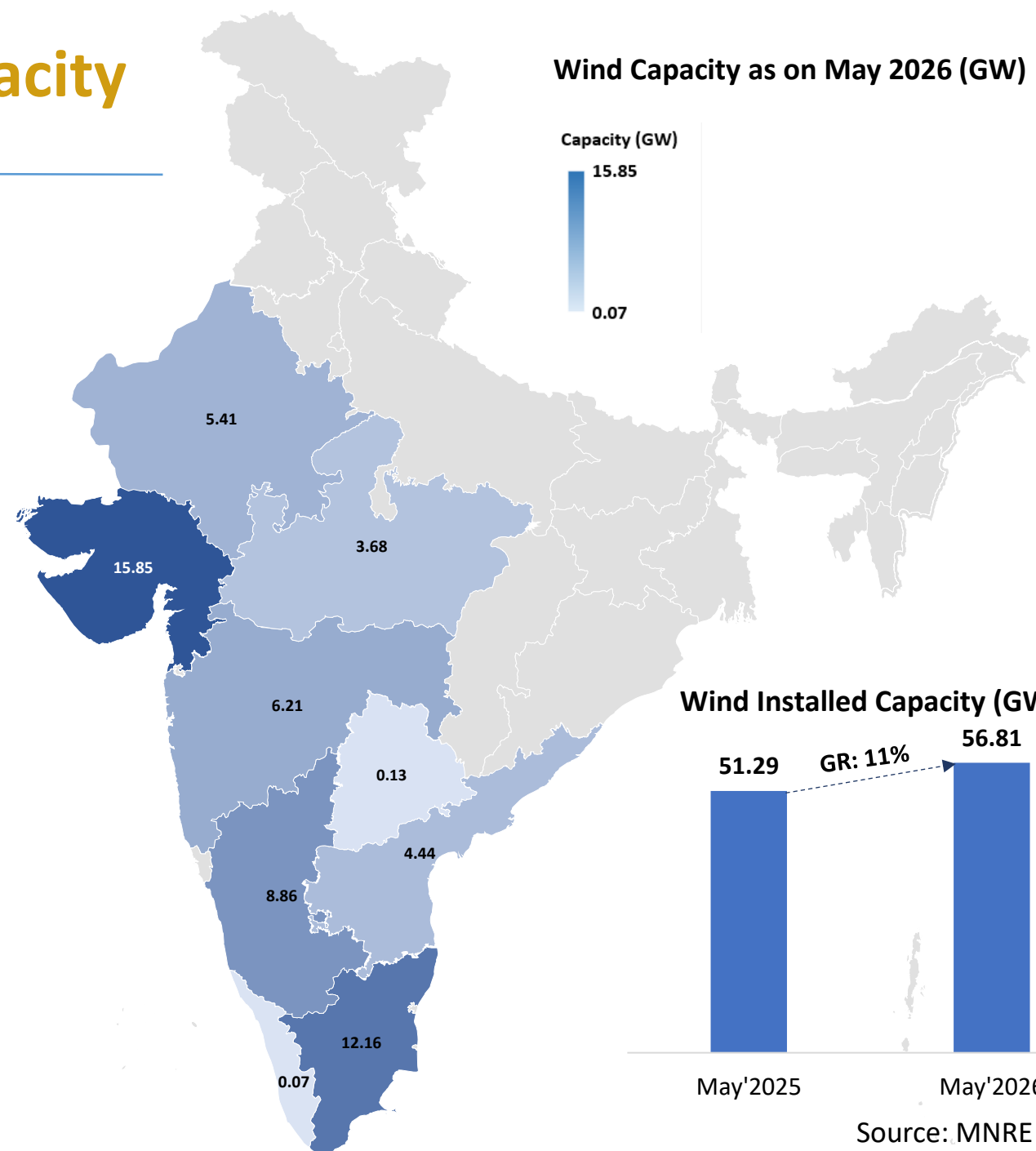
Solar Capacity as on May 2026 (GW)



State-wise Wind Onshore Capacity

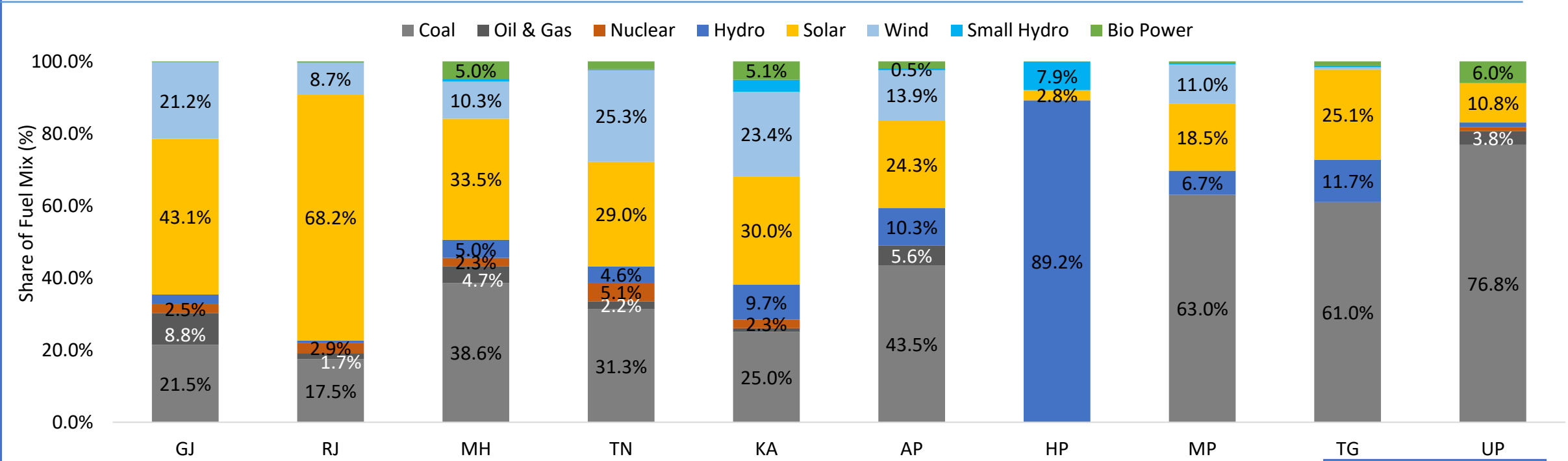
as on May 2026

State-wise installed capacity of Wind (Onshore) Power	
States	Installed Capacity (GW)
Gujarat	15.85
Tamil Nadu	12.16
Karnataka	8.86
Maharashtra	6.21
Rajasthan	5.41
Andhra Pradesh	4.44
Madhya Pradesh	3.68
Telangana	0.13
Kerala	0.07
India Total	56.81



Top 10 High RE* States and Their Capacity Mix

as on May 2026




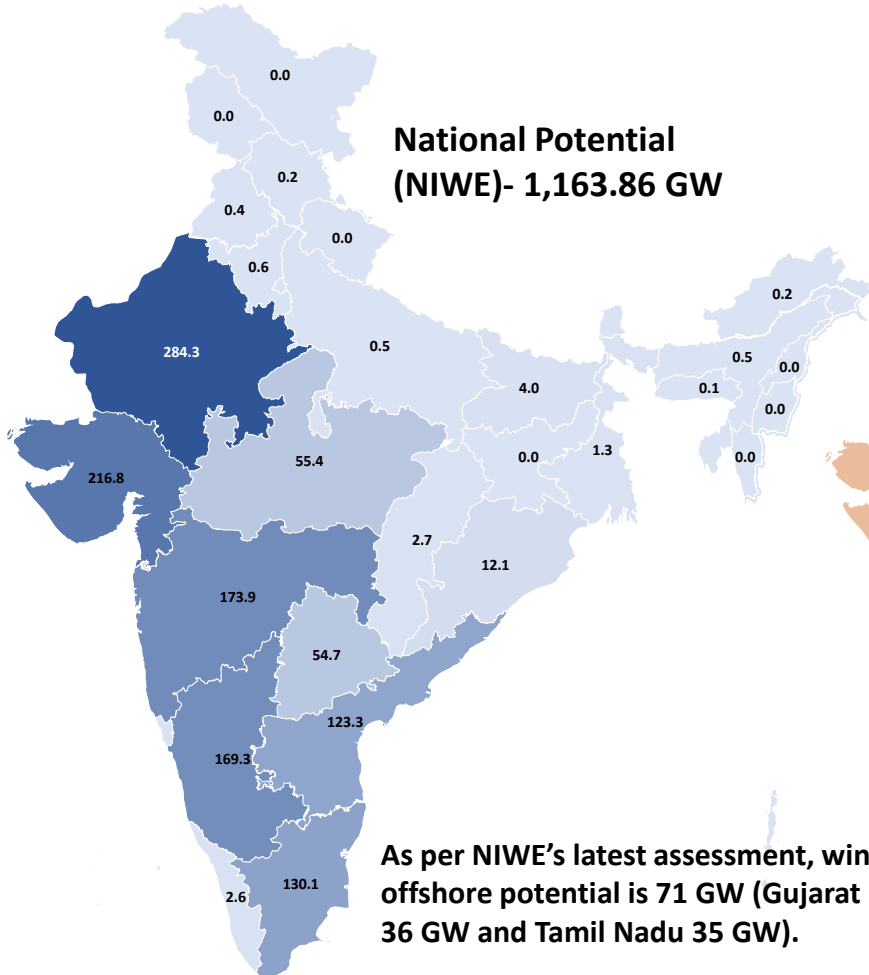
Numbers are in GW

Parameters	GJ	RJ	MH	TN	KA	AP	HP	MP	TG	UP
Total Installed Capacity	74.90	61.86	60.45	47.98	37.85	31.95	12.86	33.58	20.61	39.08
Total RE Capacity	50.39	48.23	32.92	29.45	27.09	16.29	12.86	12.41	8.03	7.12
RE Share	67%	78%	54%	61%	72%	51%	100%	37%	39%	18%


Renewable Energy (RE) Potential

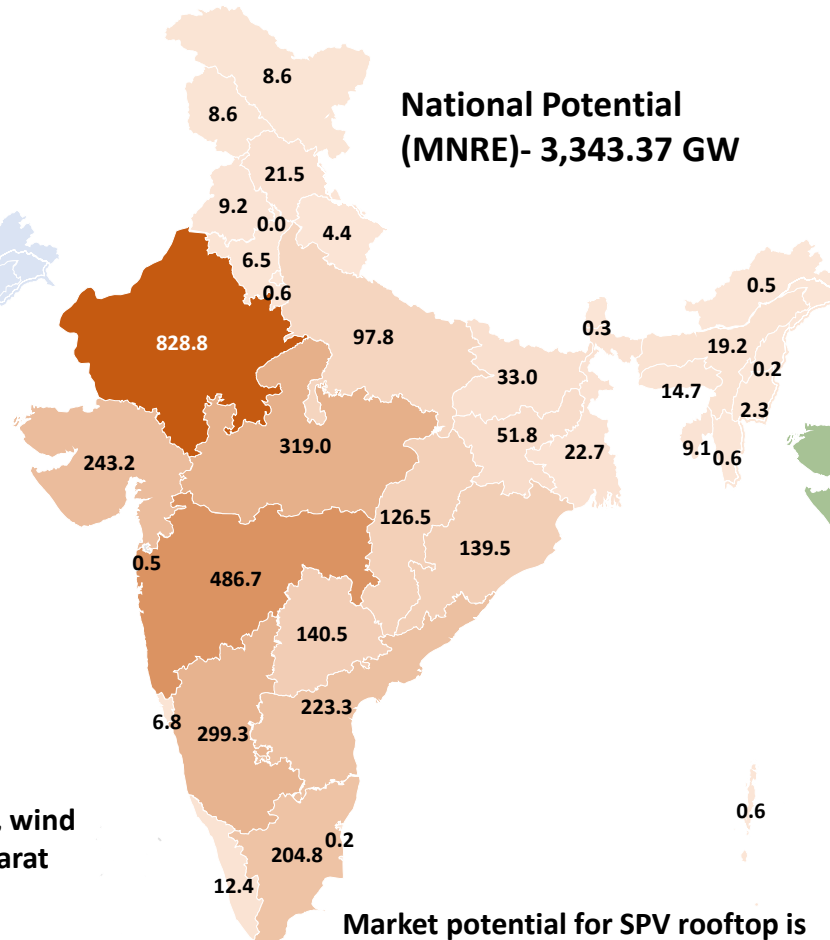
Wind Onshore (at 150m agl) and Offshore Potential

Wind Potential (GW)  0.00 284.25




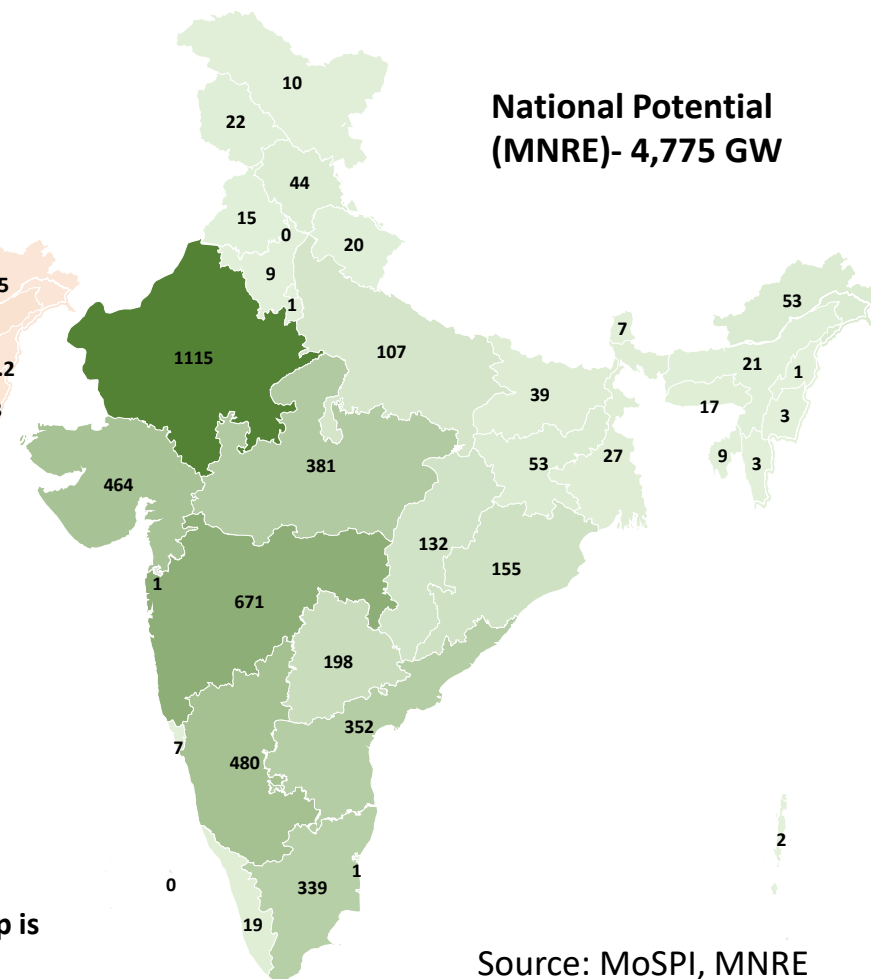
Solar Ground Mounted Potential (at 6.69% wasteland)

Solar Potential (GW)  0.0 828.8



Renewable Energy Potential (all sources incl. large Hydro)

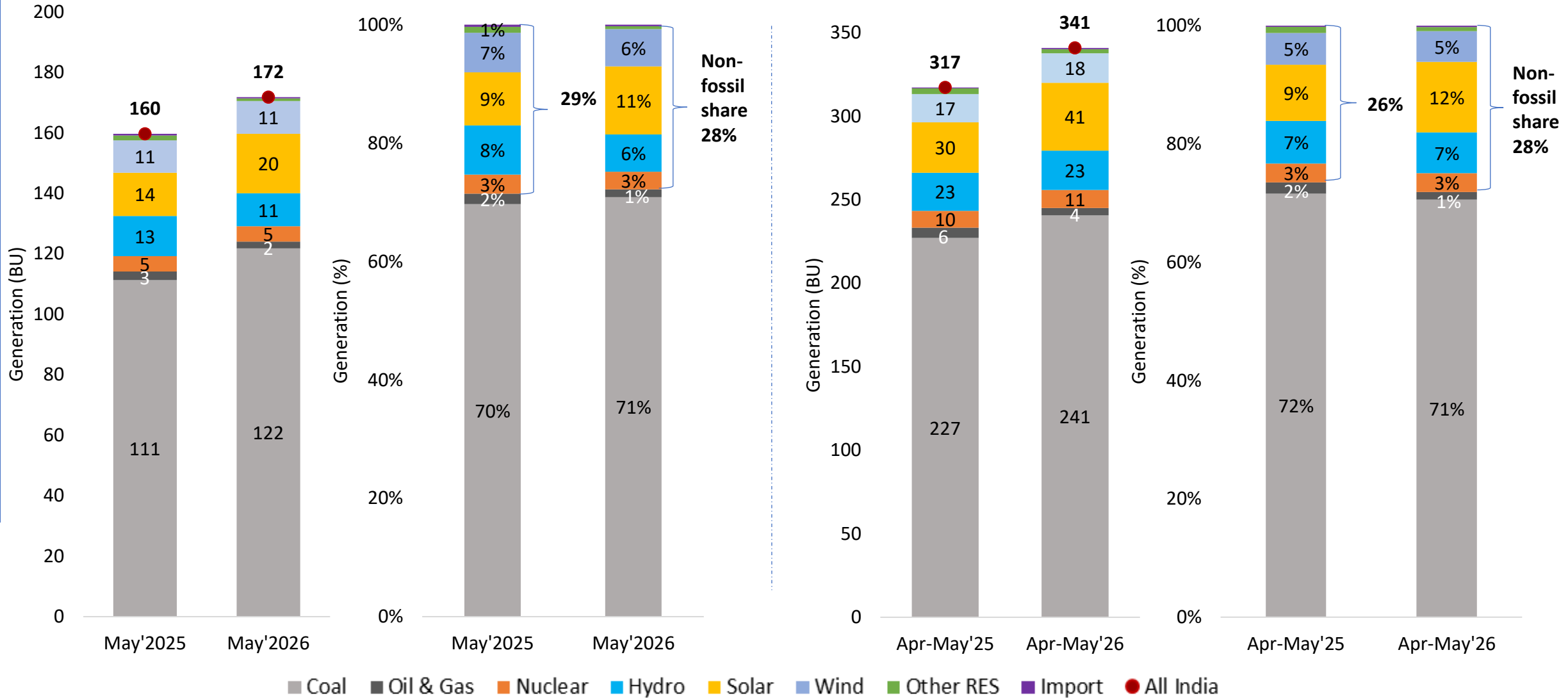
Potential (GW)  0 1115



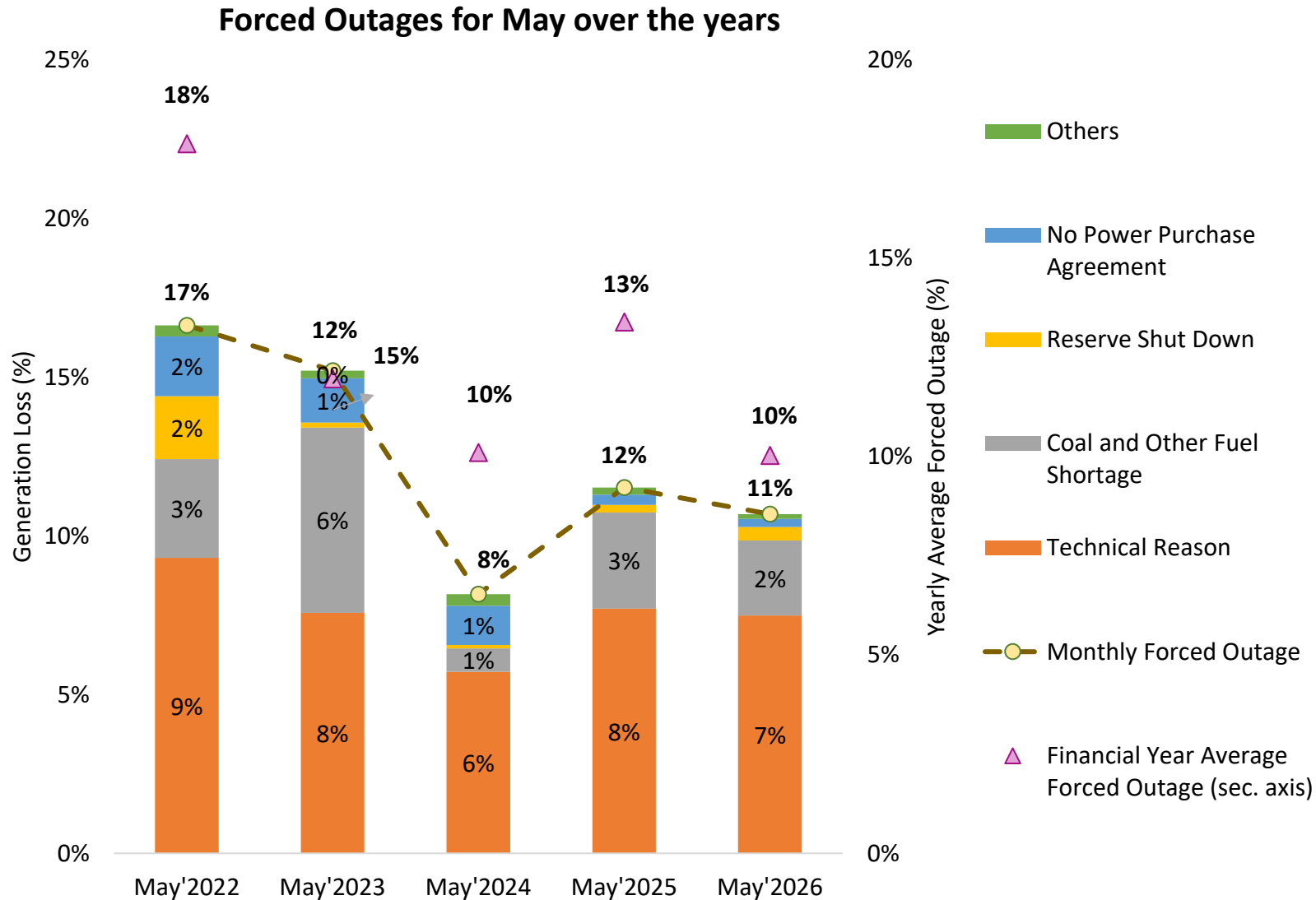
Source: MoSPI, MNRE

India's Electricity Generation Mix

Source-wise Generation Mix



Thermal Generation Loss and Reasons for Forced Outages



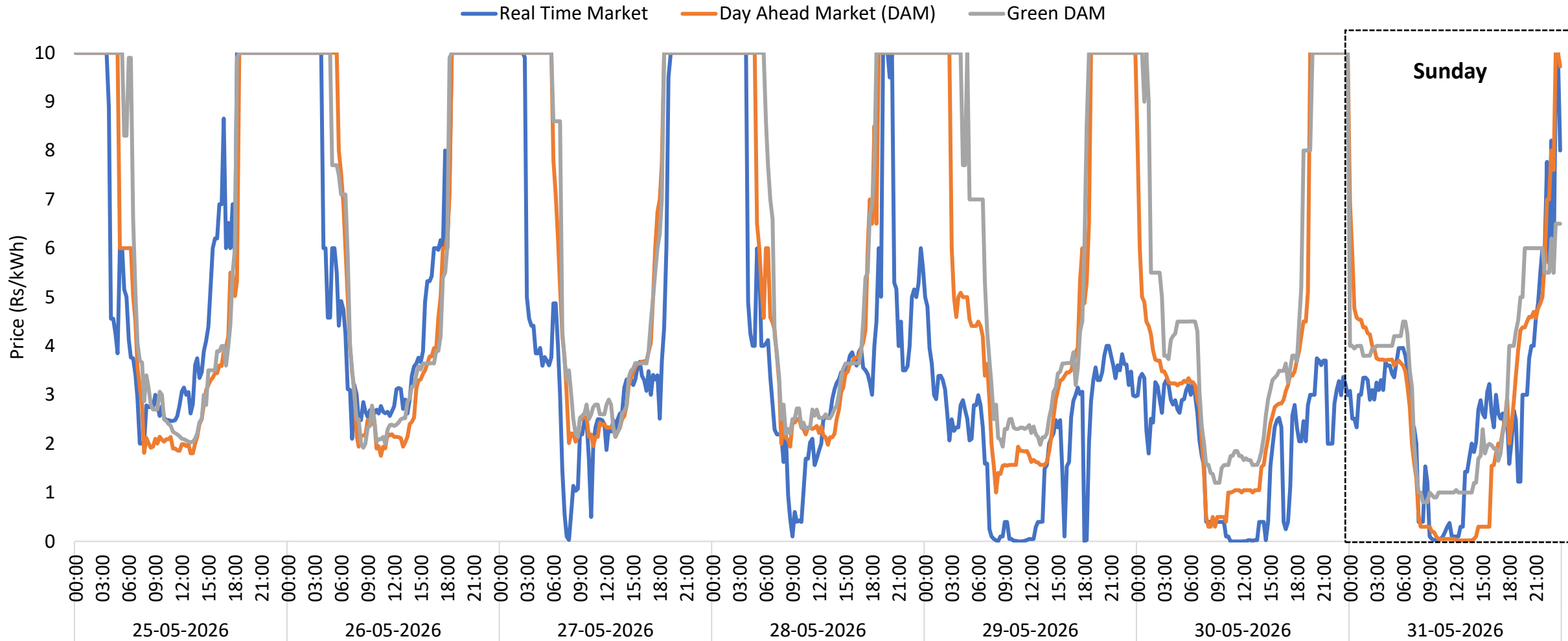
Year/ Month		Average Forced Outage Share
Yearly	FY 2024-25	10%
	FY 2025-26	13%
	FY 2026-27 (up to May'2026)	10%
Monthly	May'2024	8%
	May'2025	12%
	May'2026	11%

NOTE: Thermal includes only Coal and Lignite Plants.
Others includes Other Commercial Reasons, Raw Water Unavailability and Technical Grid.

Source: ICED

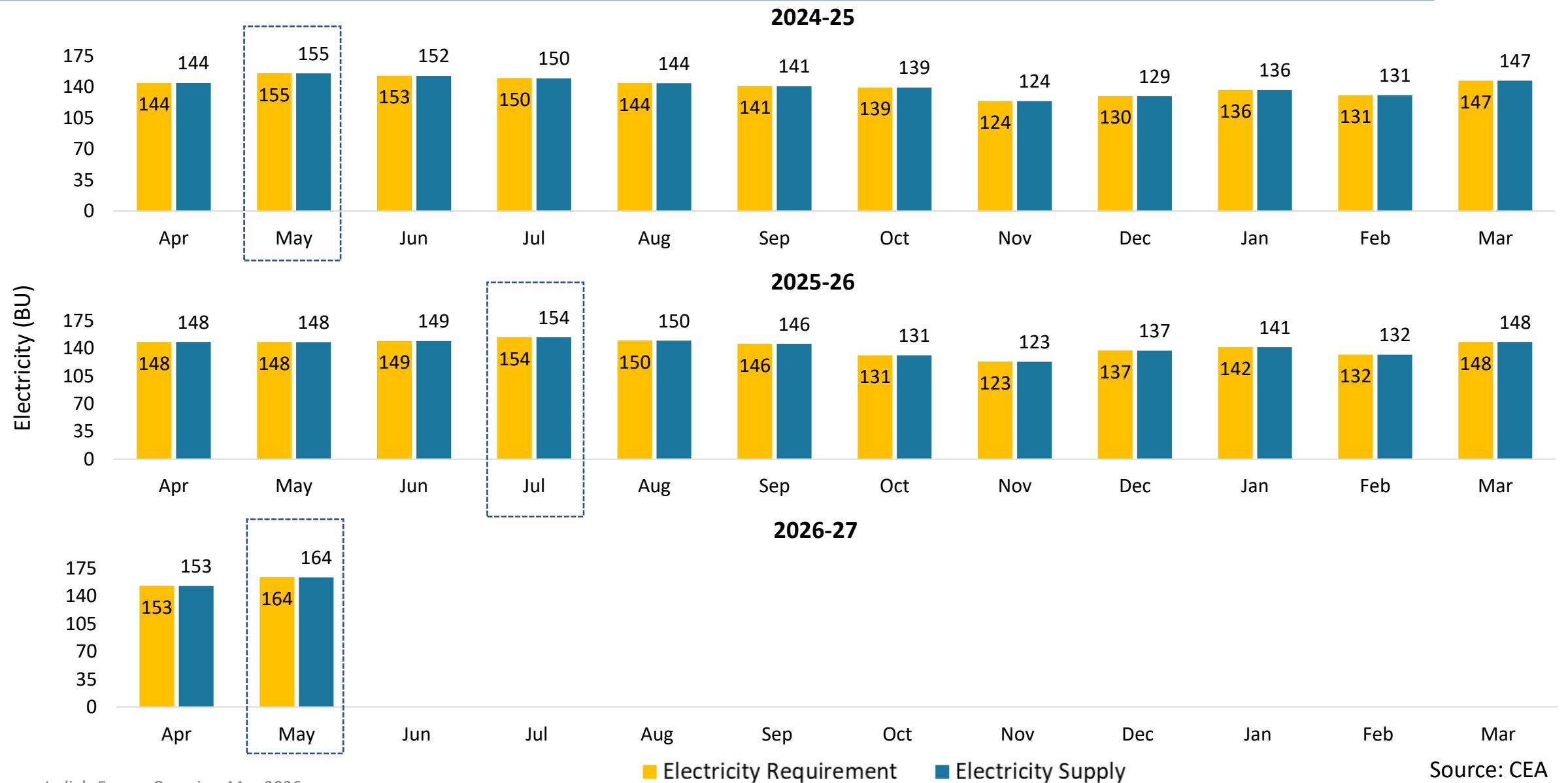
Indian Electricity Exchange (IEX) Market Snapshot

Market Clearing Prices of last 7 days of May 2026



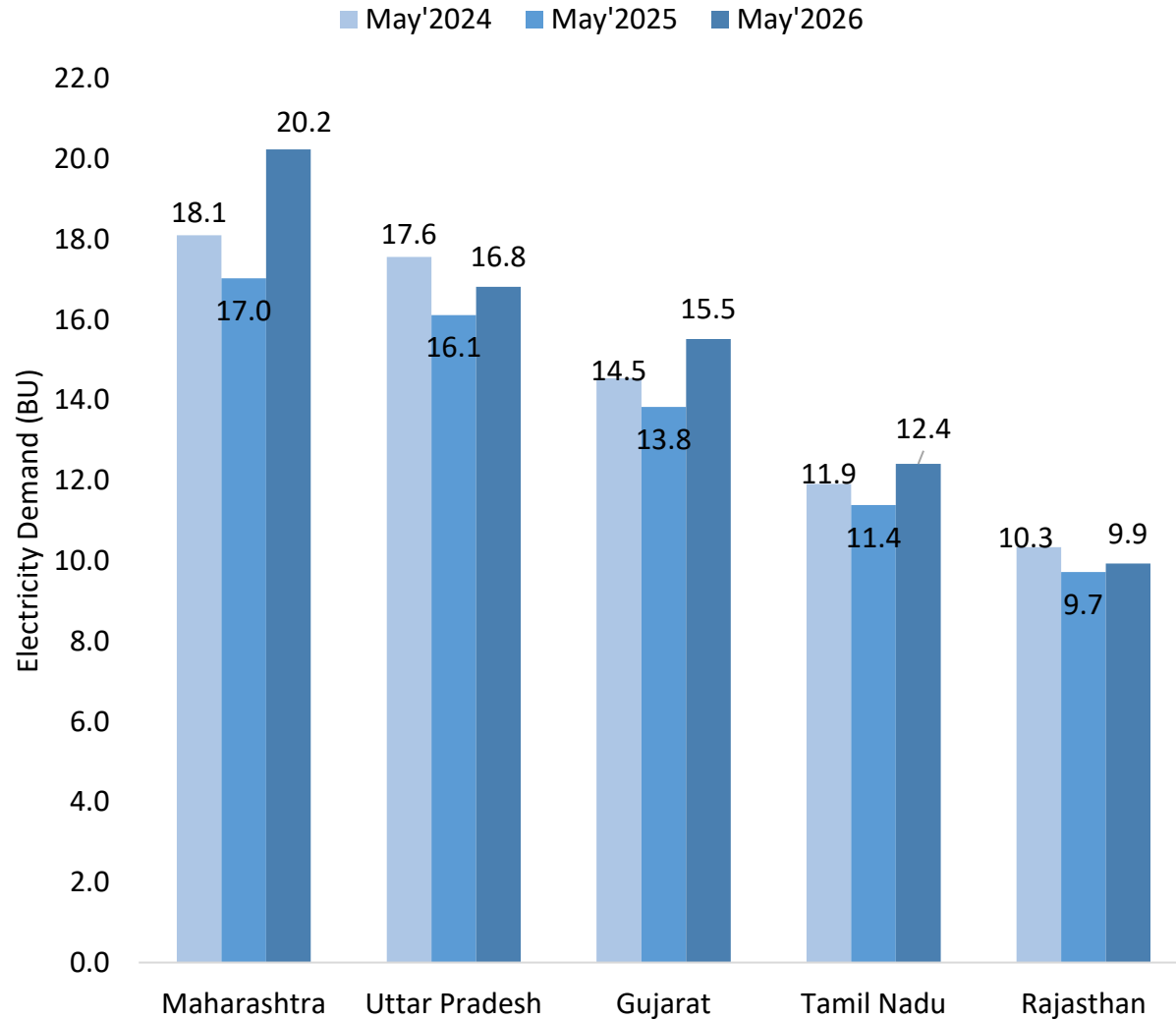
In April 2023, CERC revised the price ceiling from ₹12/kWh to ₹10/kWh in the power exchange market.

India's Monthly Electricity Requirement and Supply

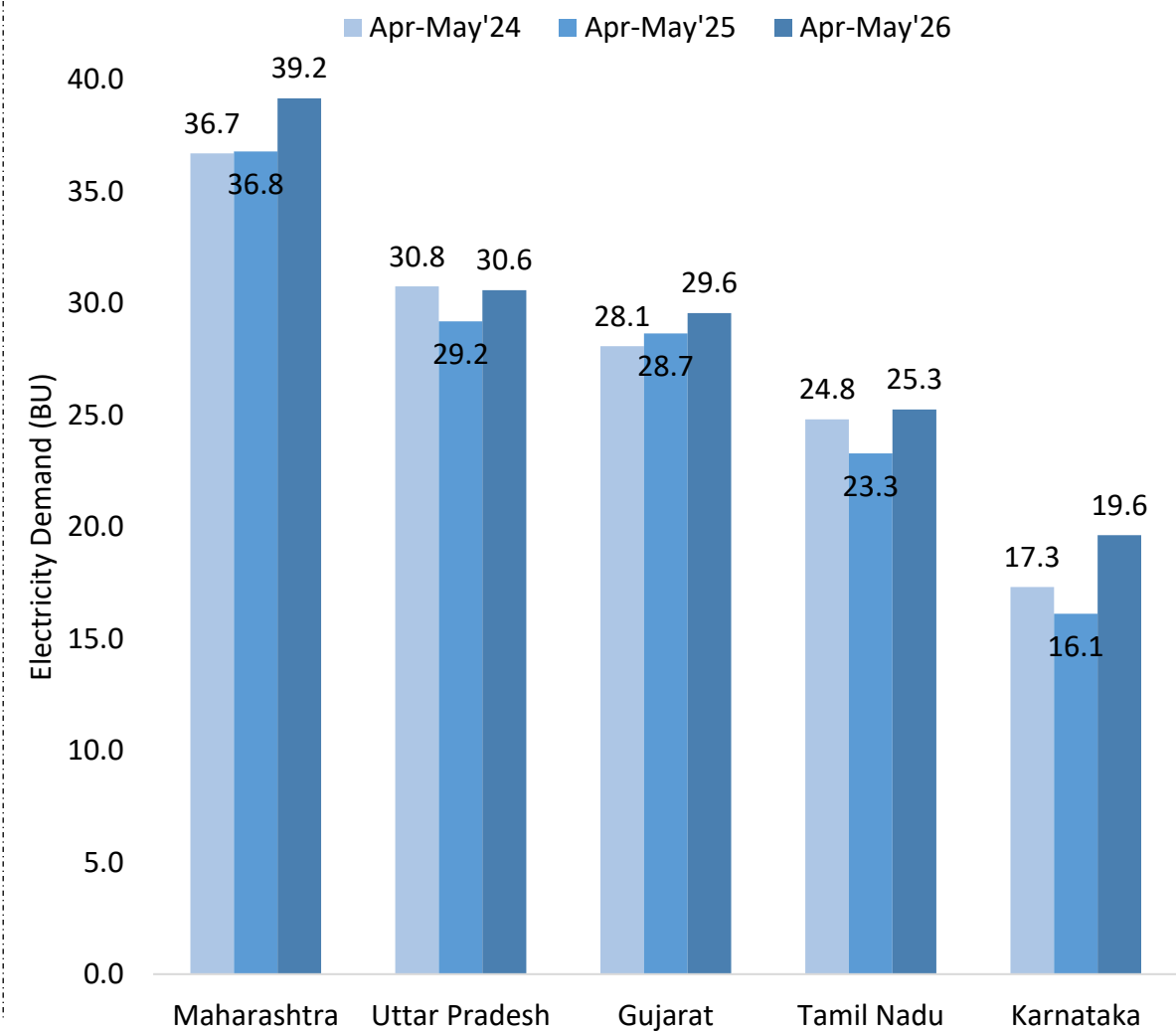


Monthly Electricity Demand of the Top 5 States

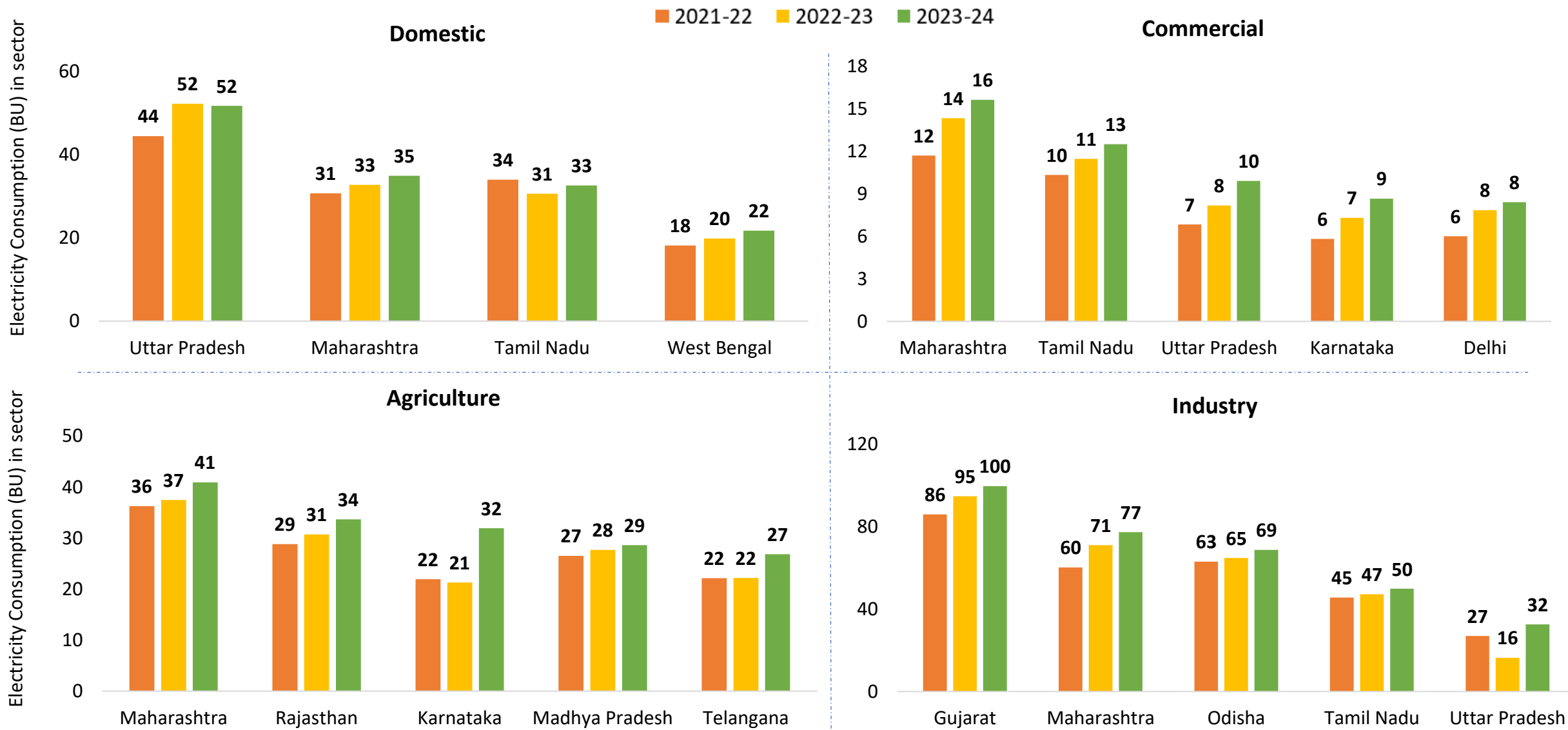
States with Highest Electricity Demand in May (BU)



States with Highest Electricity Demand (BU)



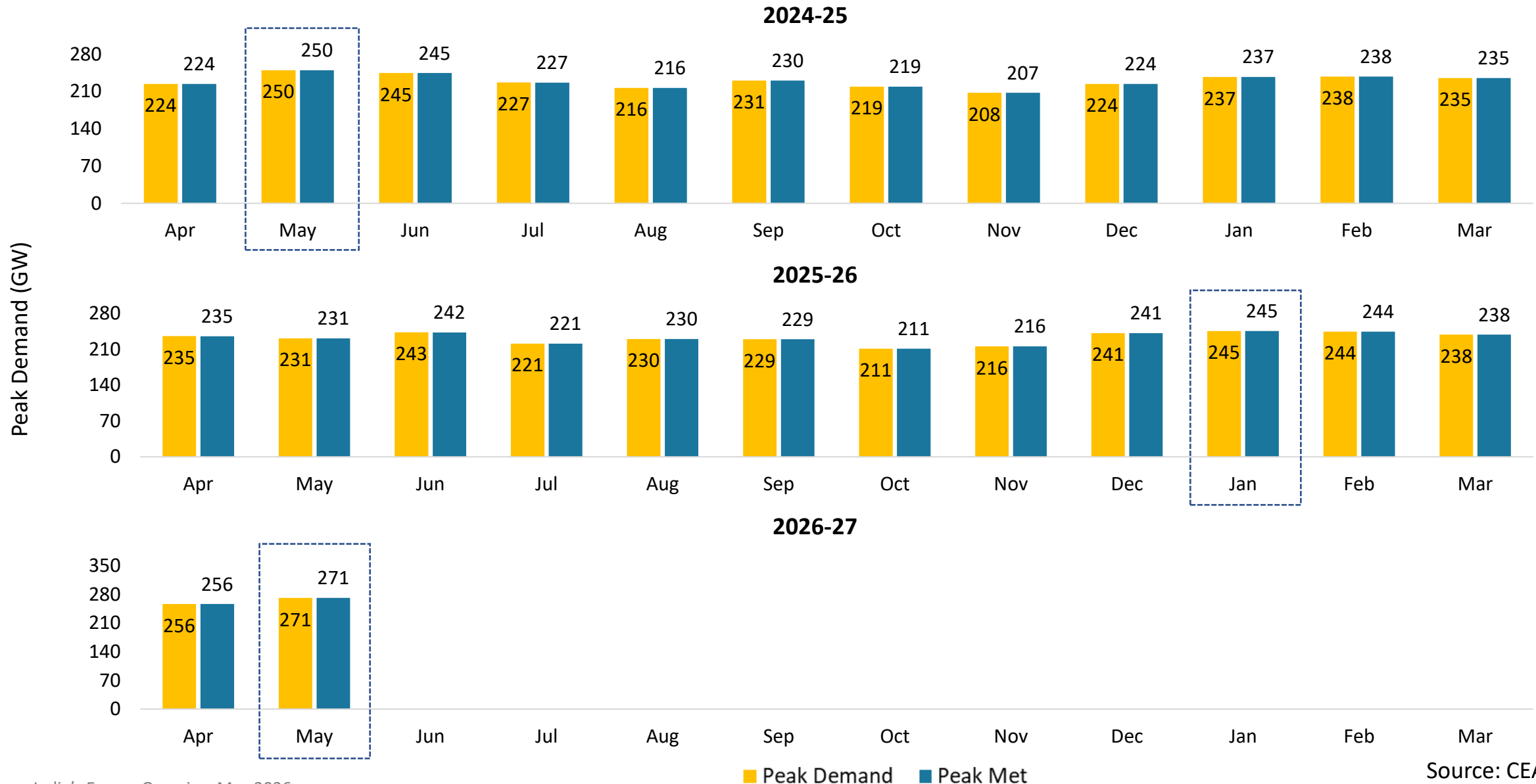
Electricity Consumer-category wise Top 5 States



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

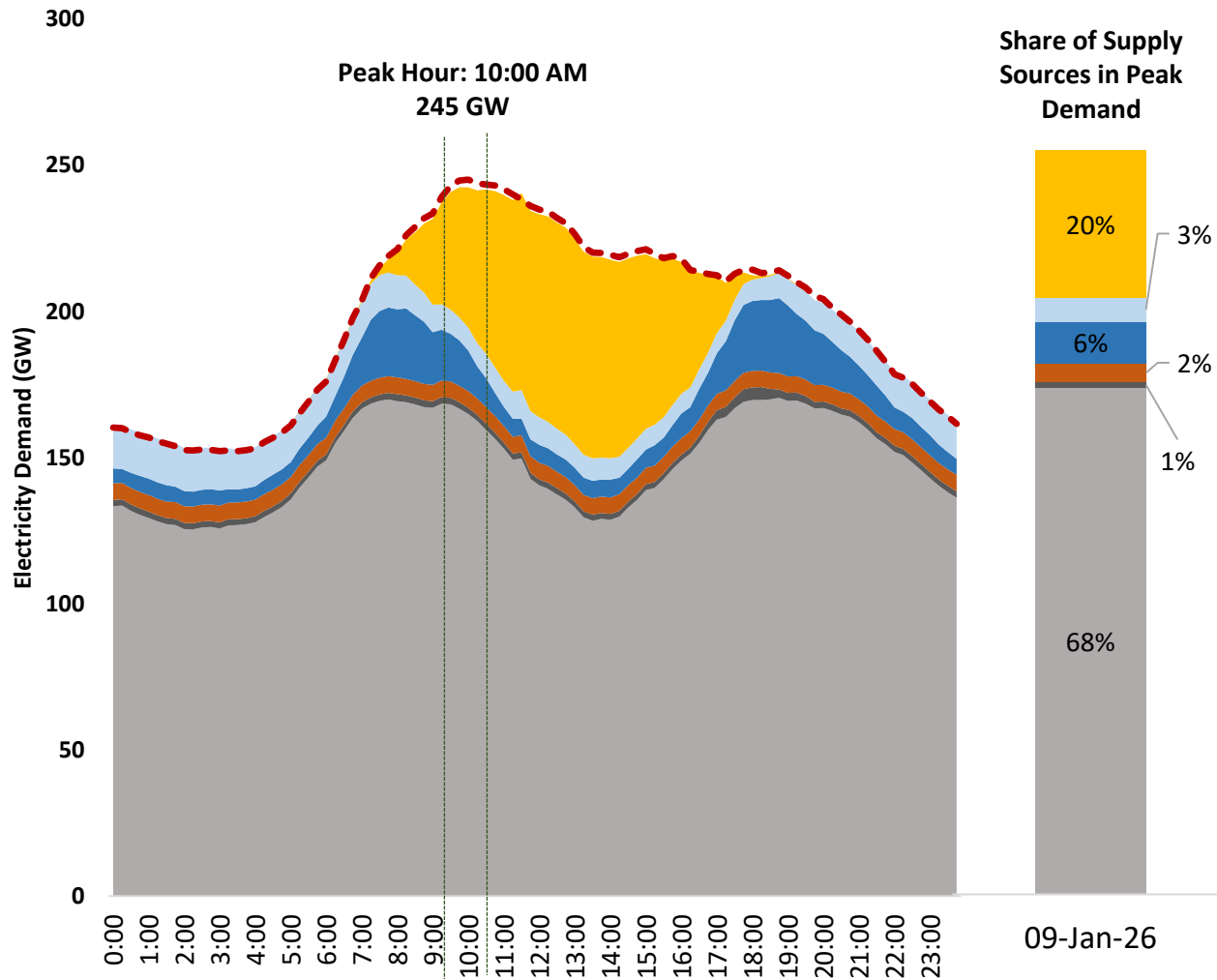
Source: CEA

India's Monthly Peak Electricity Demand and Supply

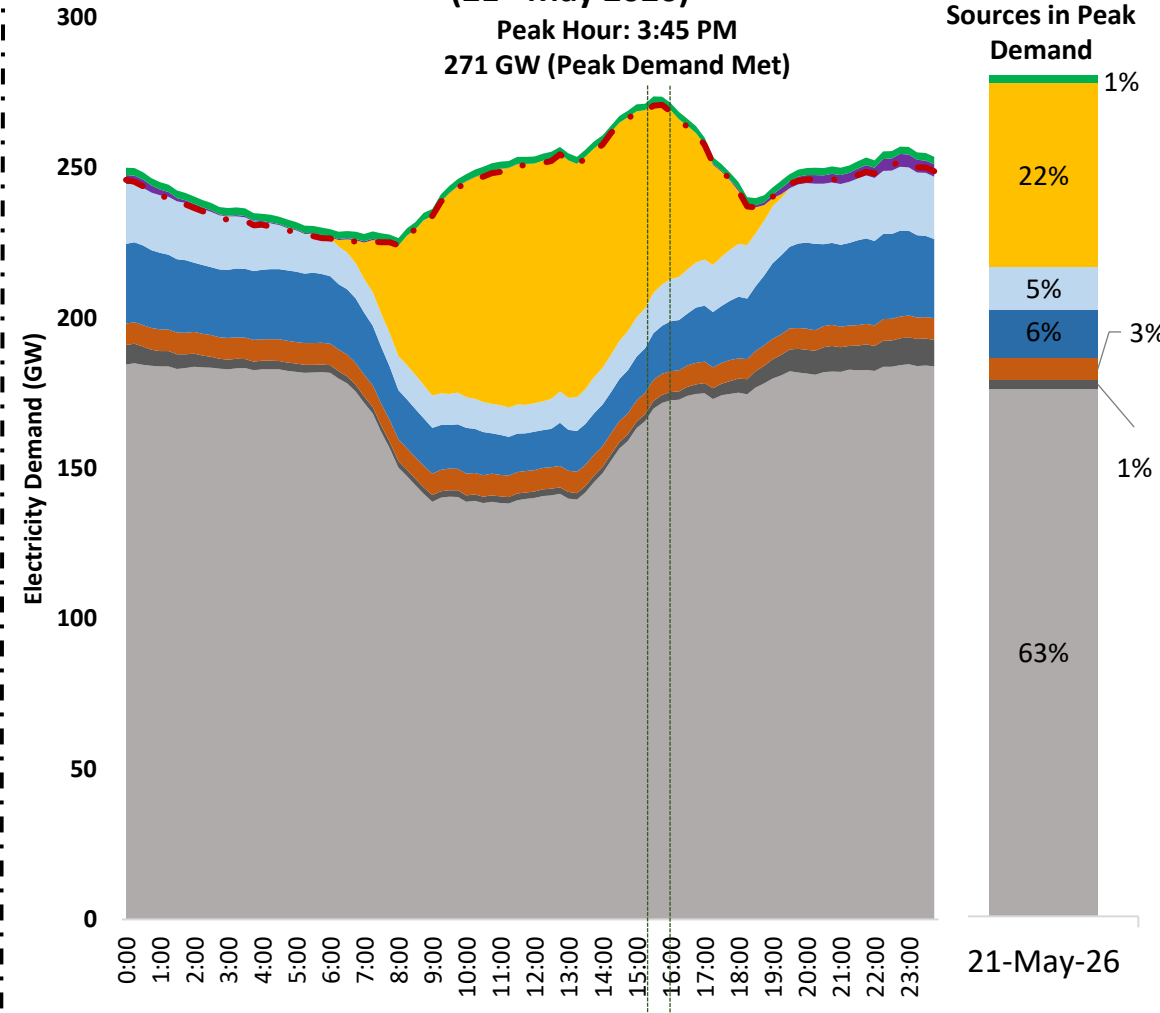


All India and Source-wise Electricity Demand Curve of Peak Demand Day

India's Electricity Demand Curve of Peak Demand Day in 2025-26
(9th Jan 2026)



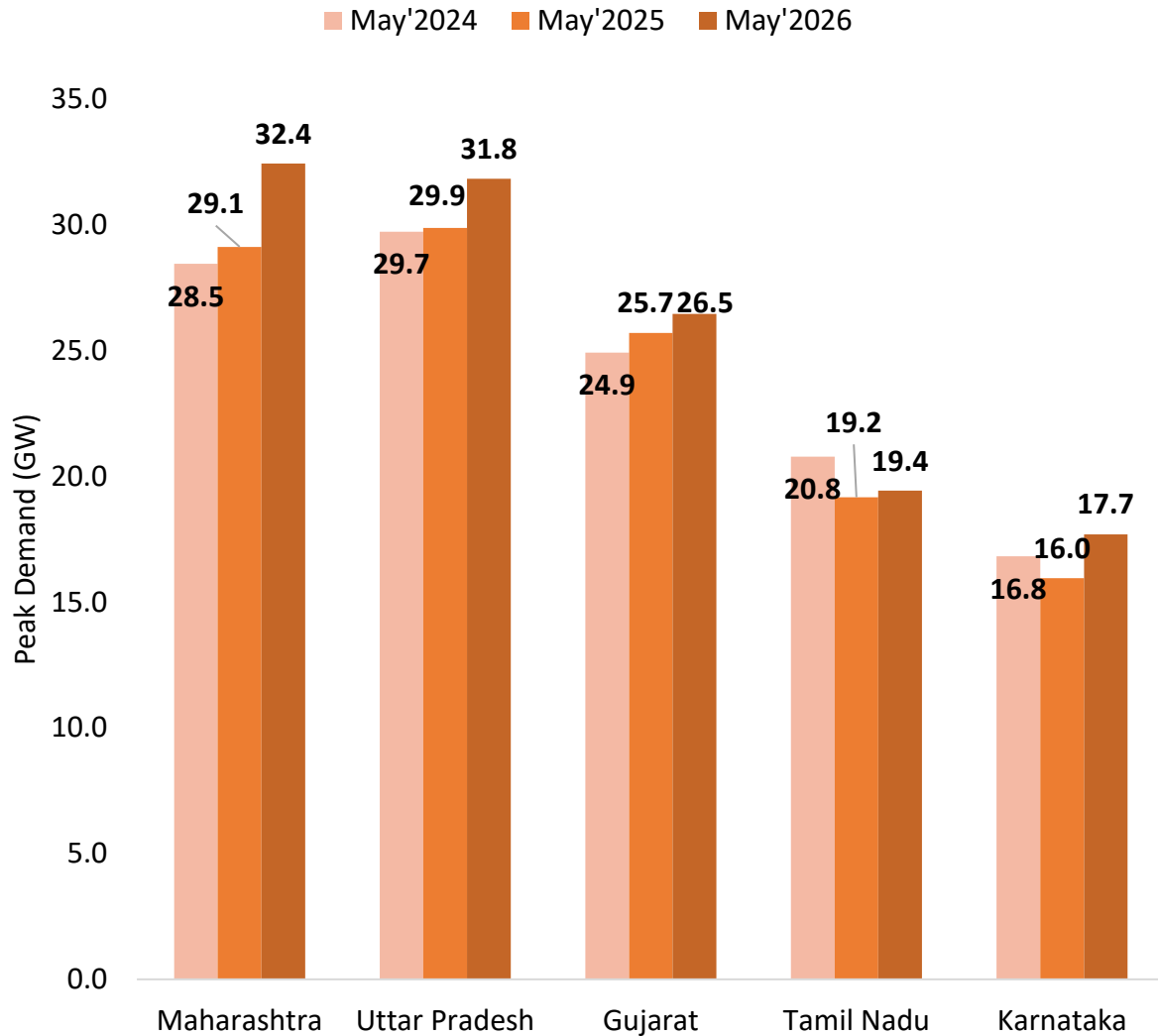
India's Electricity Demand Curve of Peak Demand Day in 2026-27
(up to May'26)
(21st May 2026)



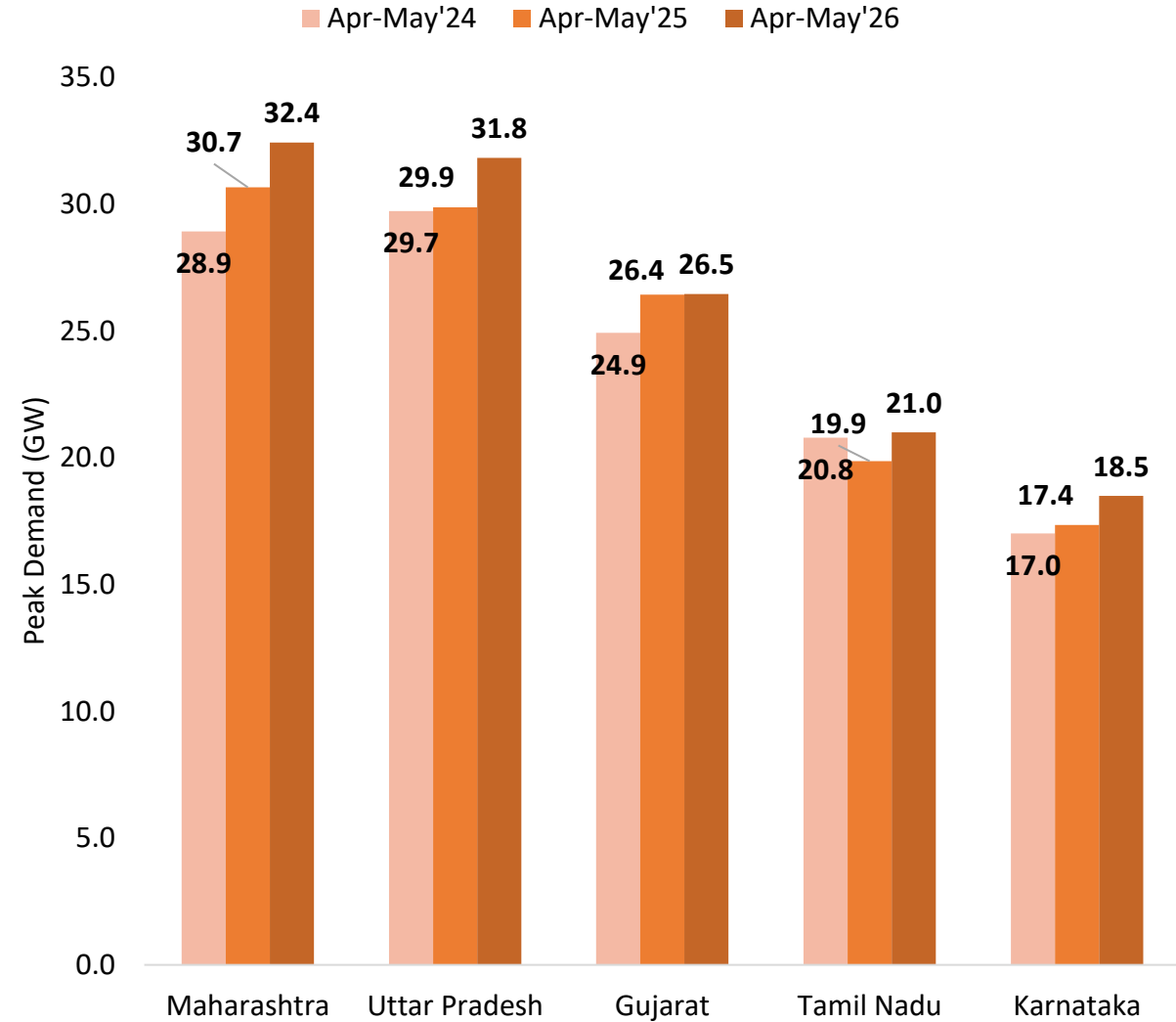
Coal Gas Nuclear Hydro Wind Solar Storage (PSP & BESS) Other RES Demand Met

Monthly Peak Electricity Demand of the Top 5 States

States with Highest Peak Electricity Demand in May (GW)

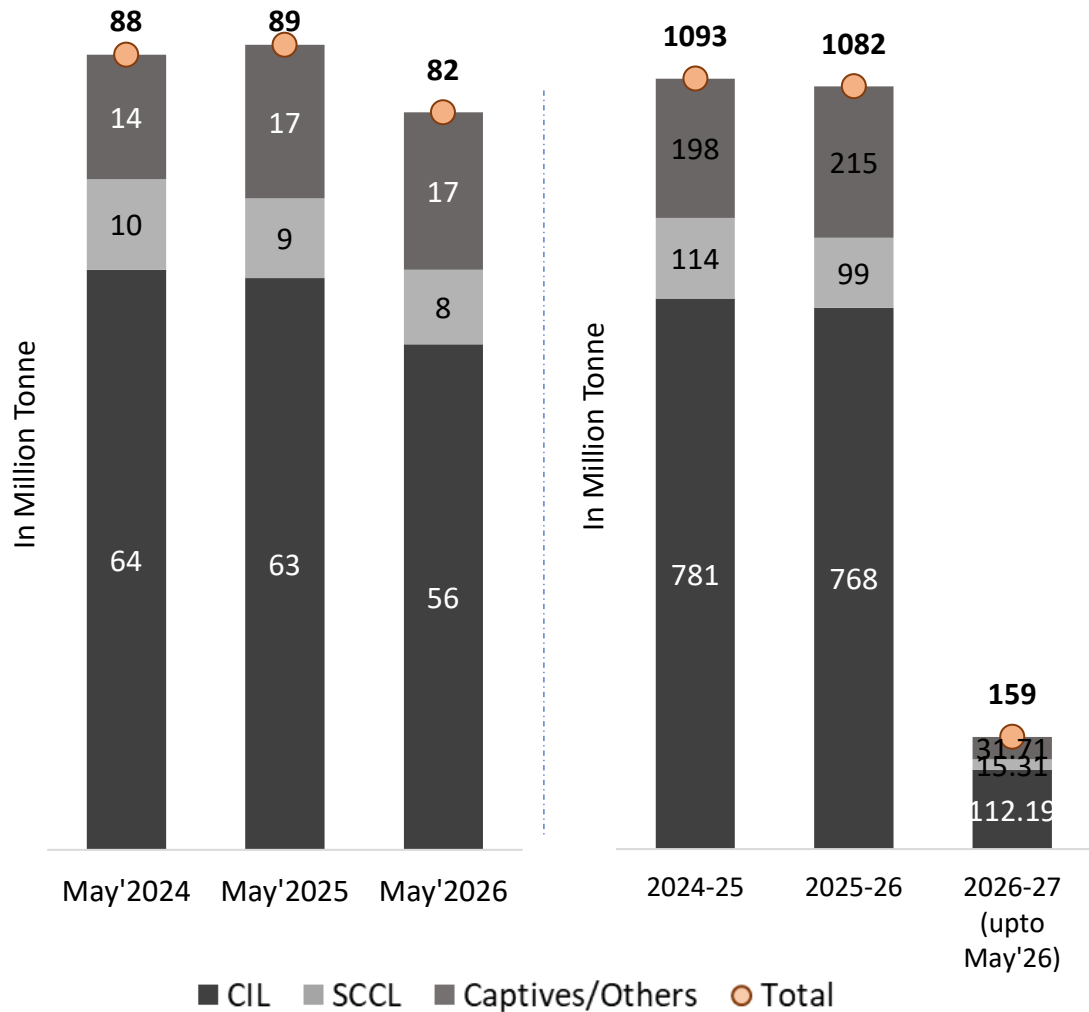


States with Highest Peak Electricity Demand (GW)

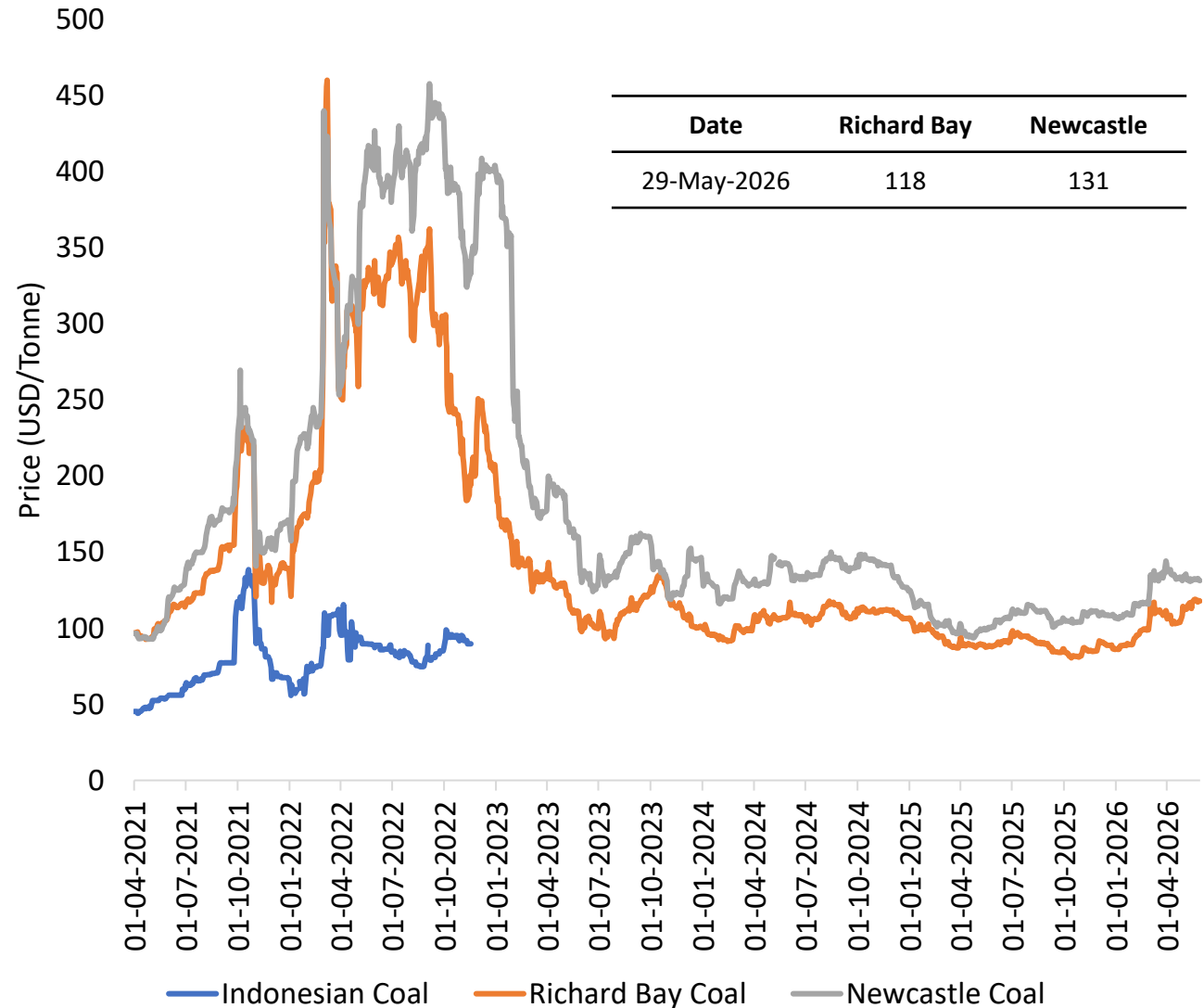


Monthly Coal Statistics

Monthly/ Annual Coal (incl. Lignite) Production (in Million Tonnes)



International Coal Prices

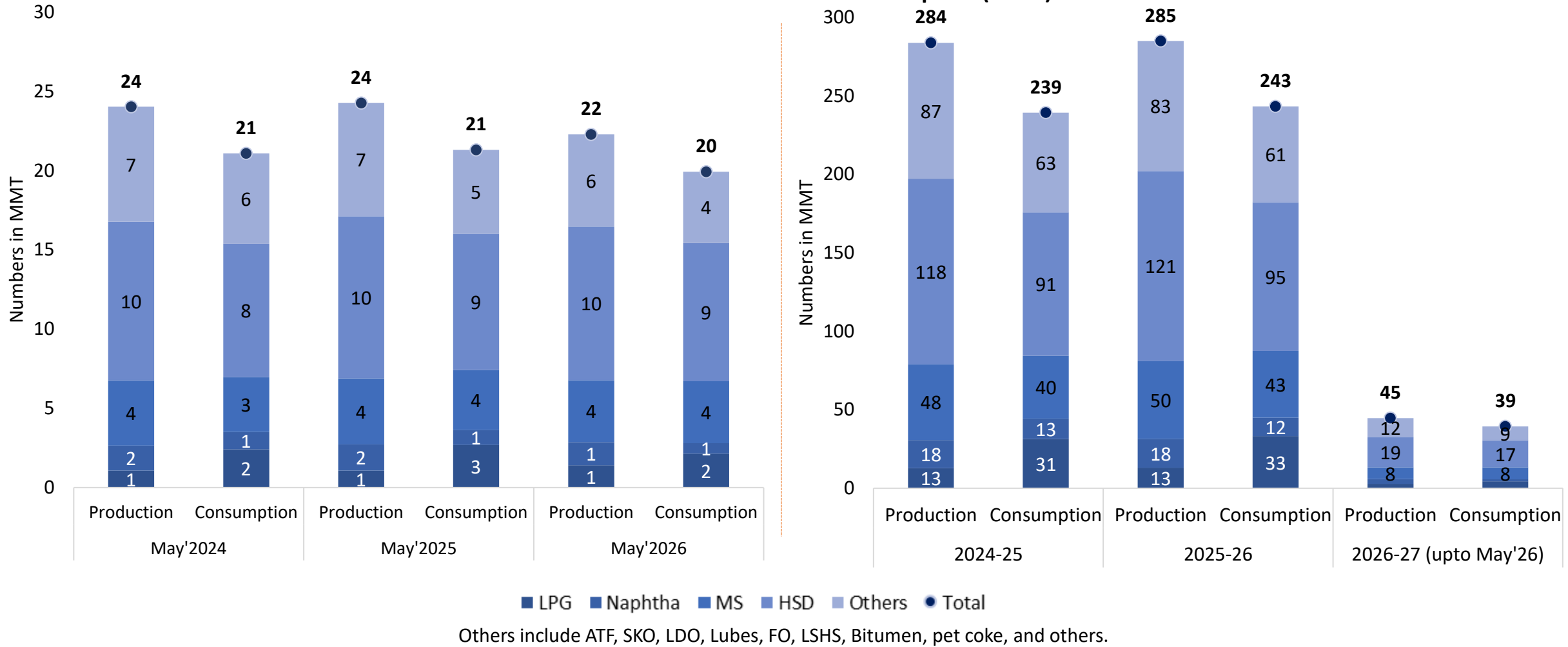


Source: Ministry of Coal

Source: Investing.com

Oil Market Scenario (1/3)

Petroleum Product-wise Production & Consumption (MMT)



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

Oil Market Scenario (2/3)

Import/Export of Crude Oil and Petroleum Products ('000 Tonnes)							
Petroleum Products	Import/ Export	Monthly			Yearly		
		May'24	May'25	May'26	2024-25	2025-26	2026-27 (up to May'26)
Crude Oil	Import	22033	21329	21565	243225	245769	41740
	Export	0	0	0	0	0	0
	Net Import	22033	21329	21565	243225	245769	41740
LPG	Import	1567	1685	1149	20667	21268	1845
	Export	44	52	29	551	566	65
	Net Import	1523	1633	1120	20116	20702	1781
Diesel	Import	8	2	3	42	38	6
	Export	2140	2348	1484	28027	27318	3111
	Net Import	-2133	-2346	-1481	-27985	-27280	-3105
Petrol	Import	87	0	0	235	0	0
	Export	1277	1452	910	15830	16666	1796
	Net Import	-1191	-1452	-910	-15596	-16666	-1796
Others	Import	2590	2503	1711	29960	24887	3290
	Export	1795	1777	1298	20667	16877	2251
	Net Import	795	726	413	9293	8010	1039

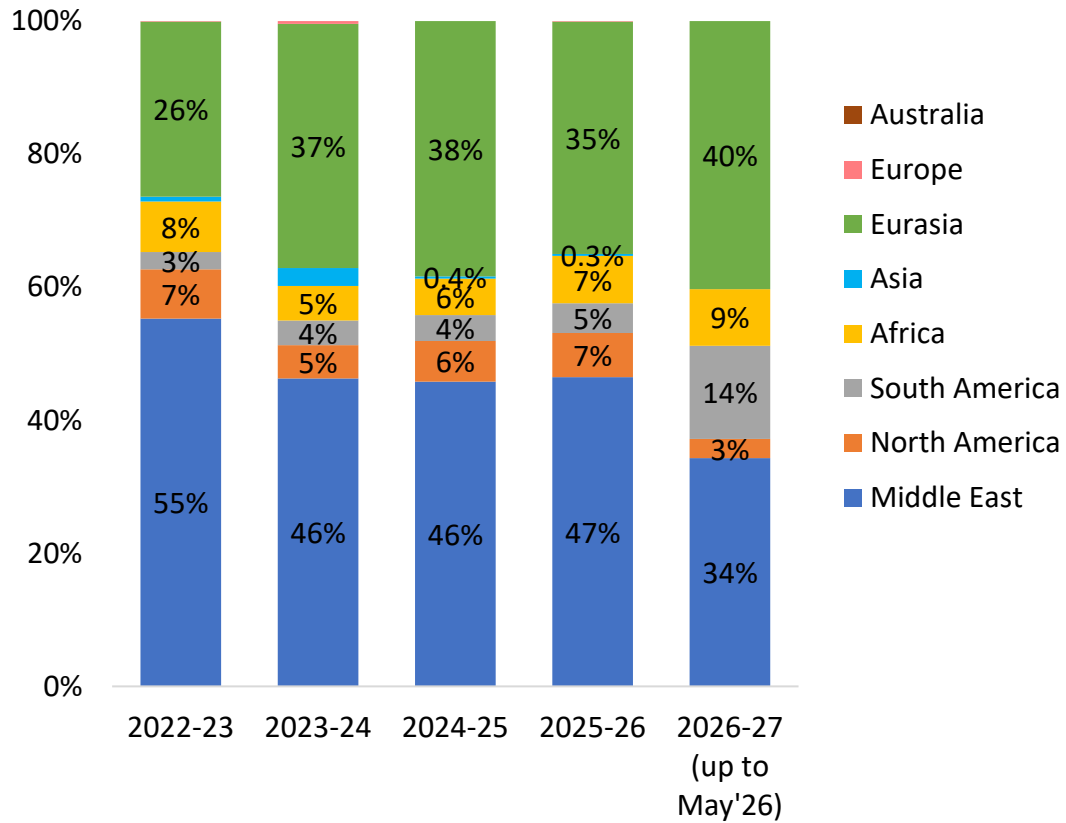
*Others include ATF, Naphtha, SKO, LDO, Lubes, FO, LSHS, Bitumen, pet coke, and others.

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

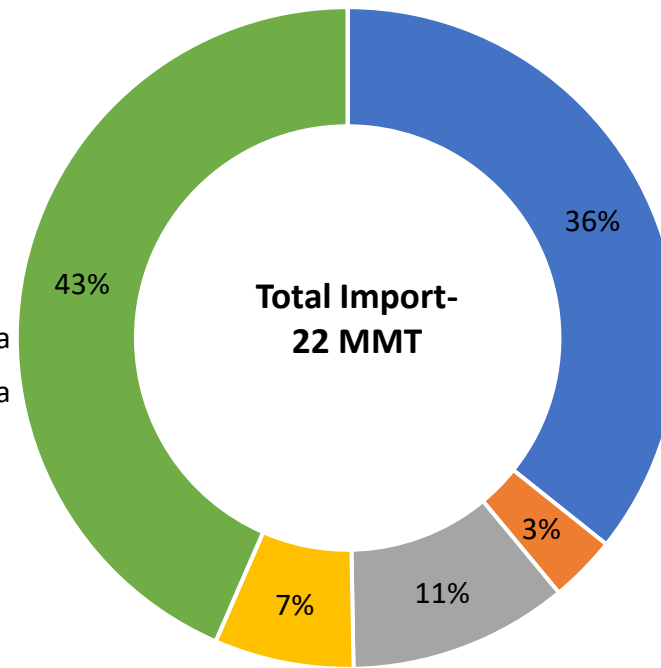
Source: PPAC

Oil Market Scenario (3/3)

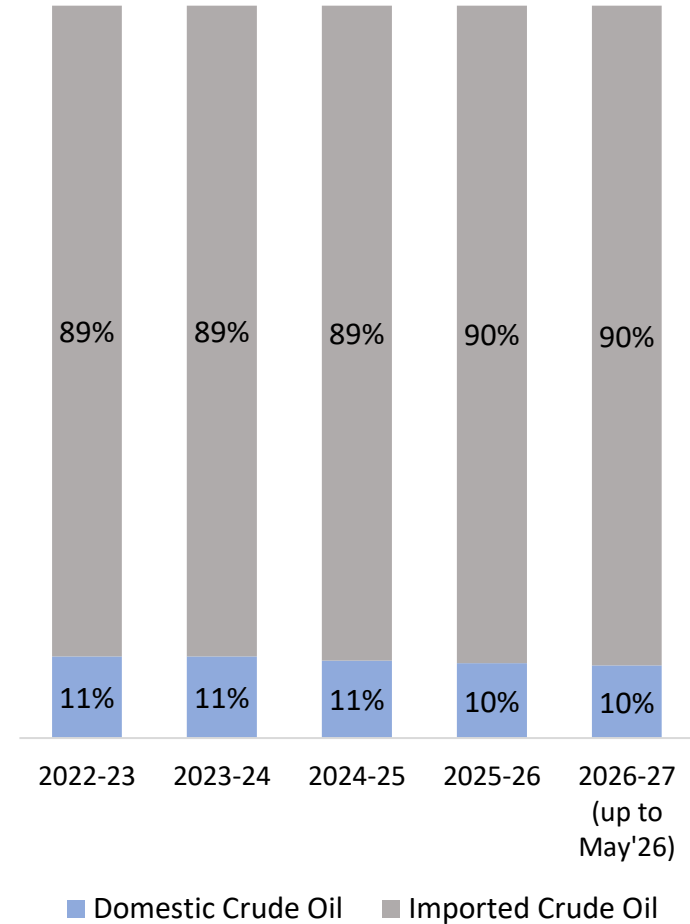
Region-wise Share in Import of Crude Oil (%)



Regional share of Imported Crude oil in May 2026



Domestic and Imported Crude Oil share in India (%)

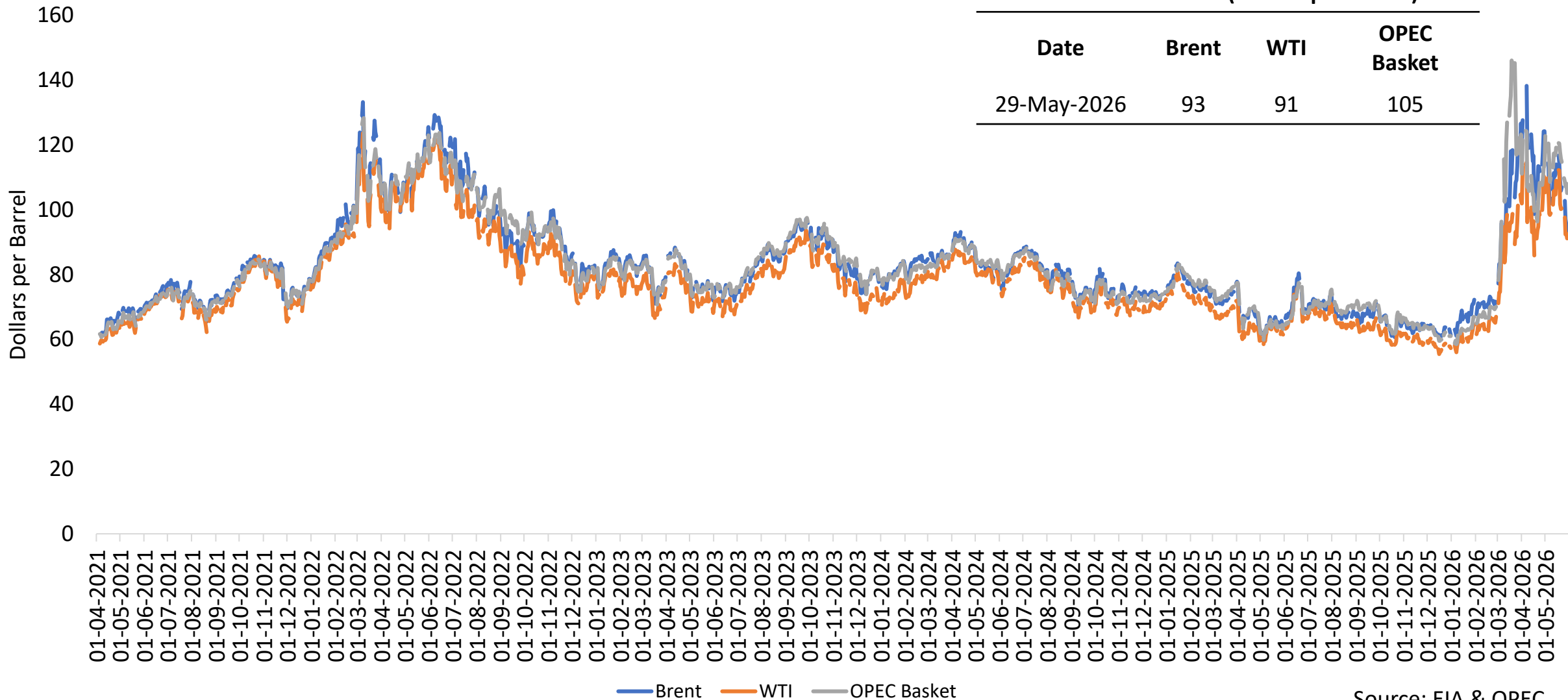


Total Import of Crude Oil (MMT)

Total Import	2024-25	2025-26	2026-27 (up to May'26)
Crude Oil	243	246	42

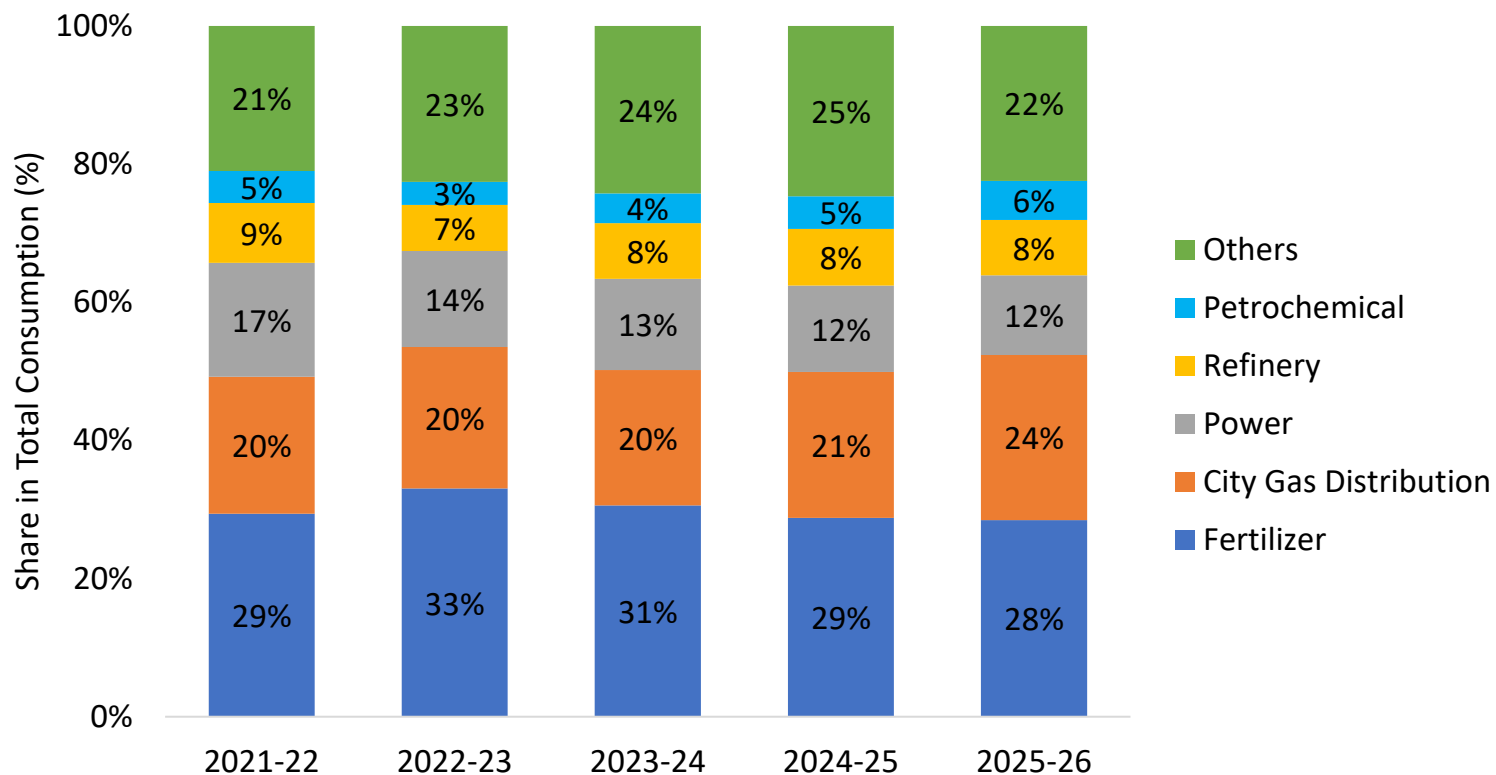
Daily Prices of Crude Oil

Daily Prices of Crude Oil

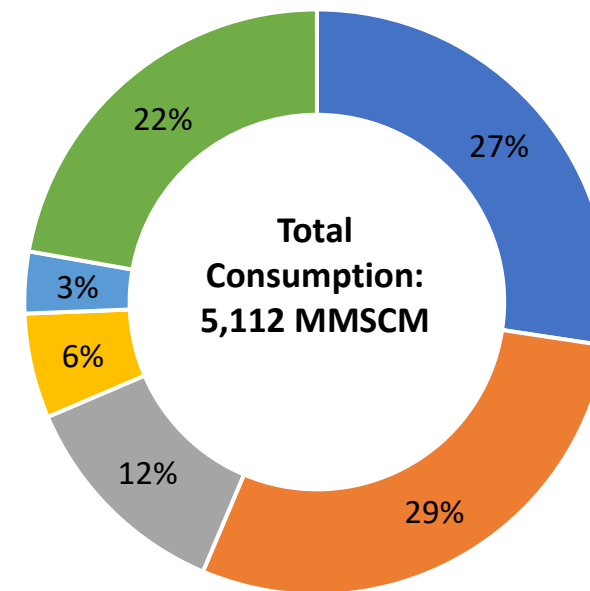


Gas Market Scenario (1/2)

Sector-wise Share in Natural Gas Consumption



Sector-wise Share in Natural Gas Consumption in April 2026



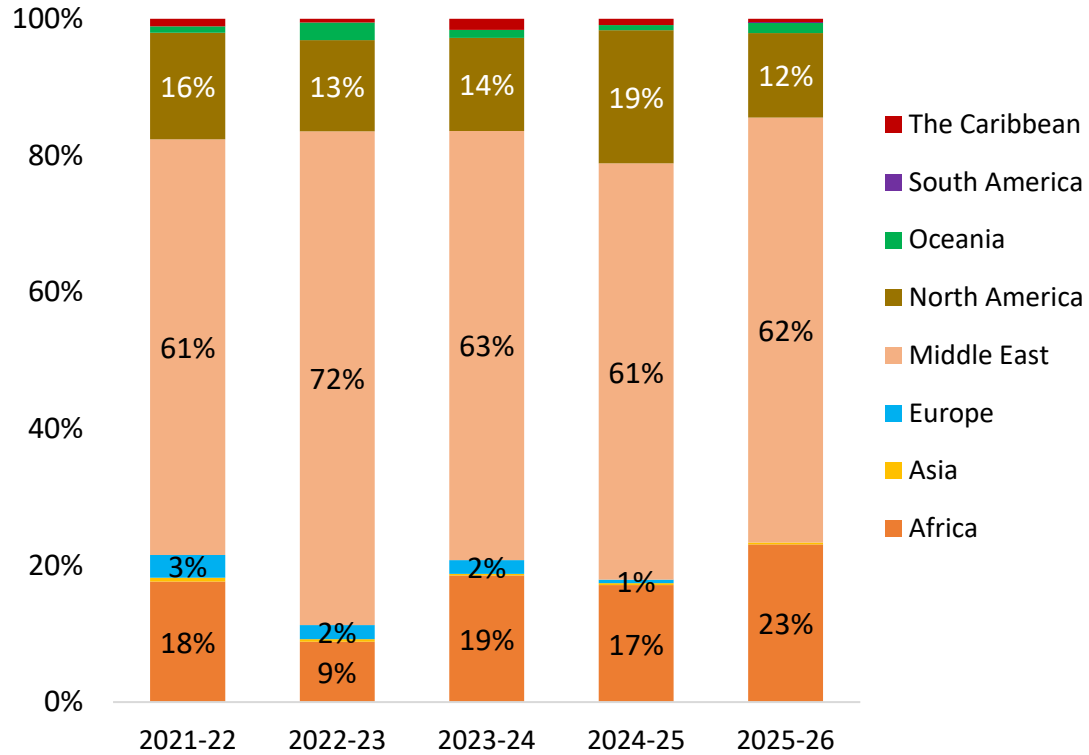
Others include- Internal Consumption of Pipeline System, Industrial, Sponge iron/steel, LPG shrinkage, Manufacturing, Agriculture (tea plantation), Others

Total Consumption of Natural Gas (NG) (MMSCM)

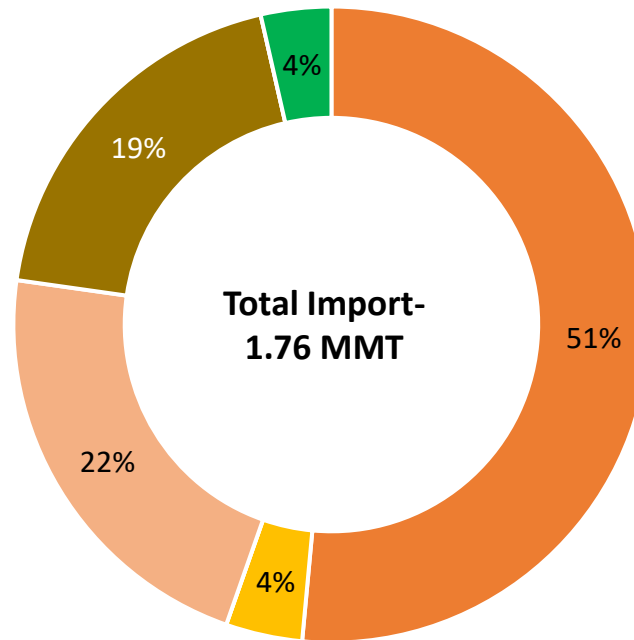
Total Consumption	2021-22	2022-23	2023-24	2024-25	2025-26
Natural Gas	61,491	58,702	68,809	71,196	69,048

Gas Market Scenario (2/2)

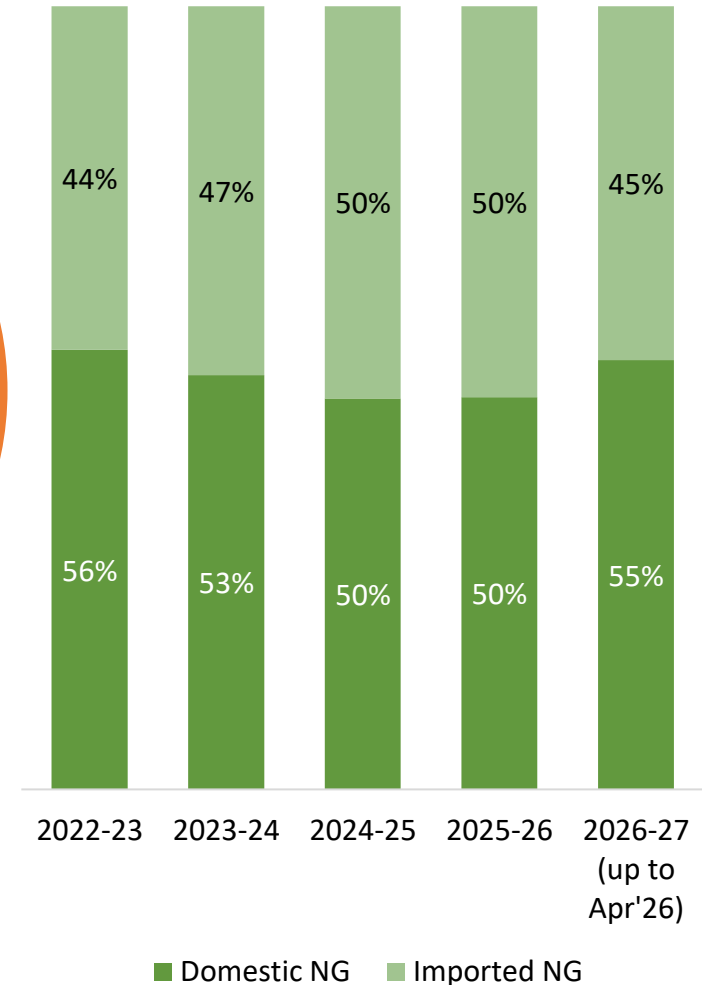
Region-wise Share in Import of LNG (%)



Regional Share of Imported LNG in April 2026



Domestic and Imported Natural Gas share in India (%)

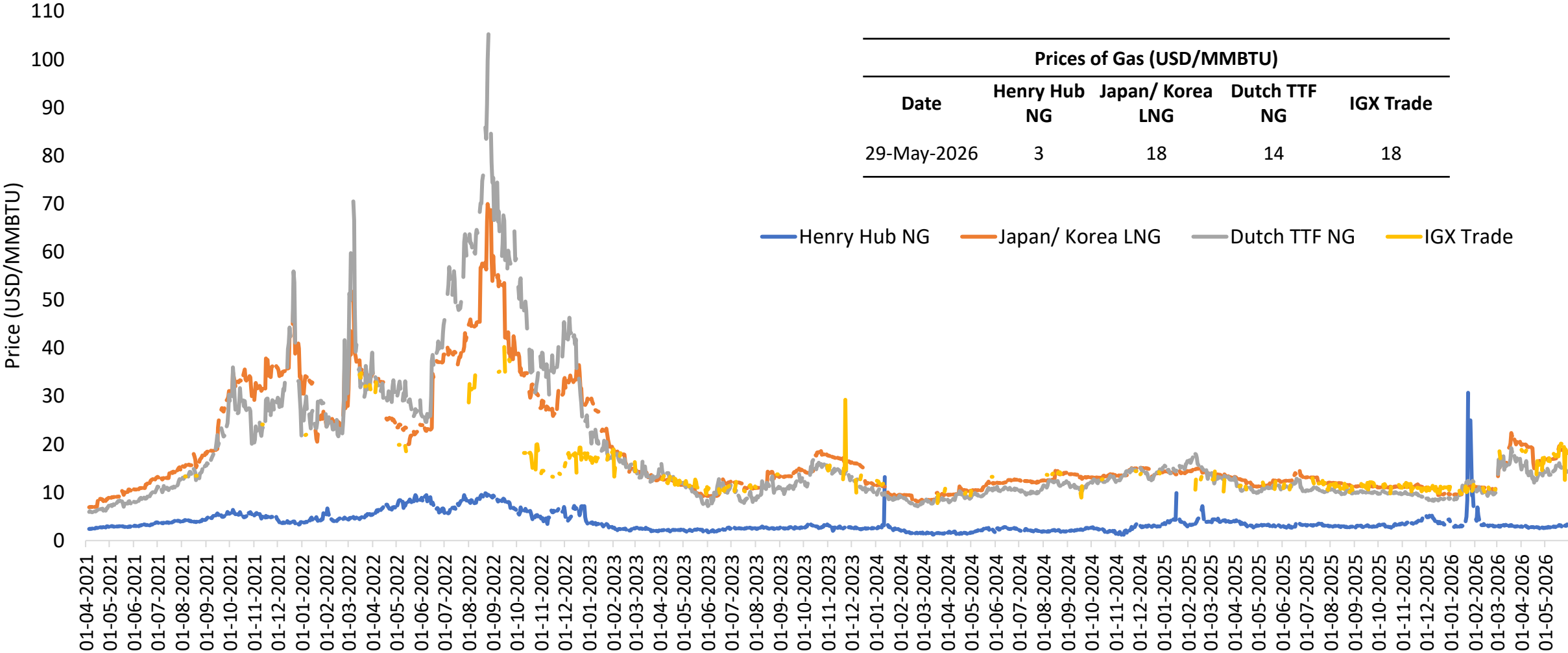


Total Import of Liquefied Natural Gas (LNG) (MMT)

Total Import	2023-24	2024-25	2025-26
LNG	24.00	26.96	25.82

Daily Prices of Gas

Gas Daily Market Price

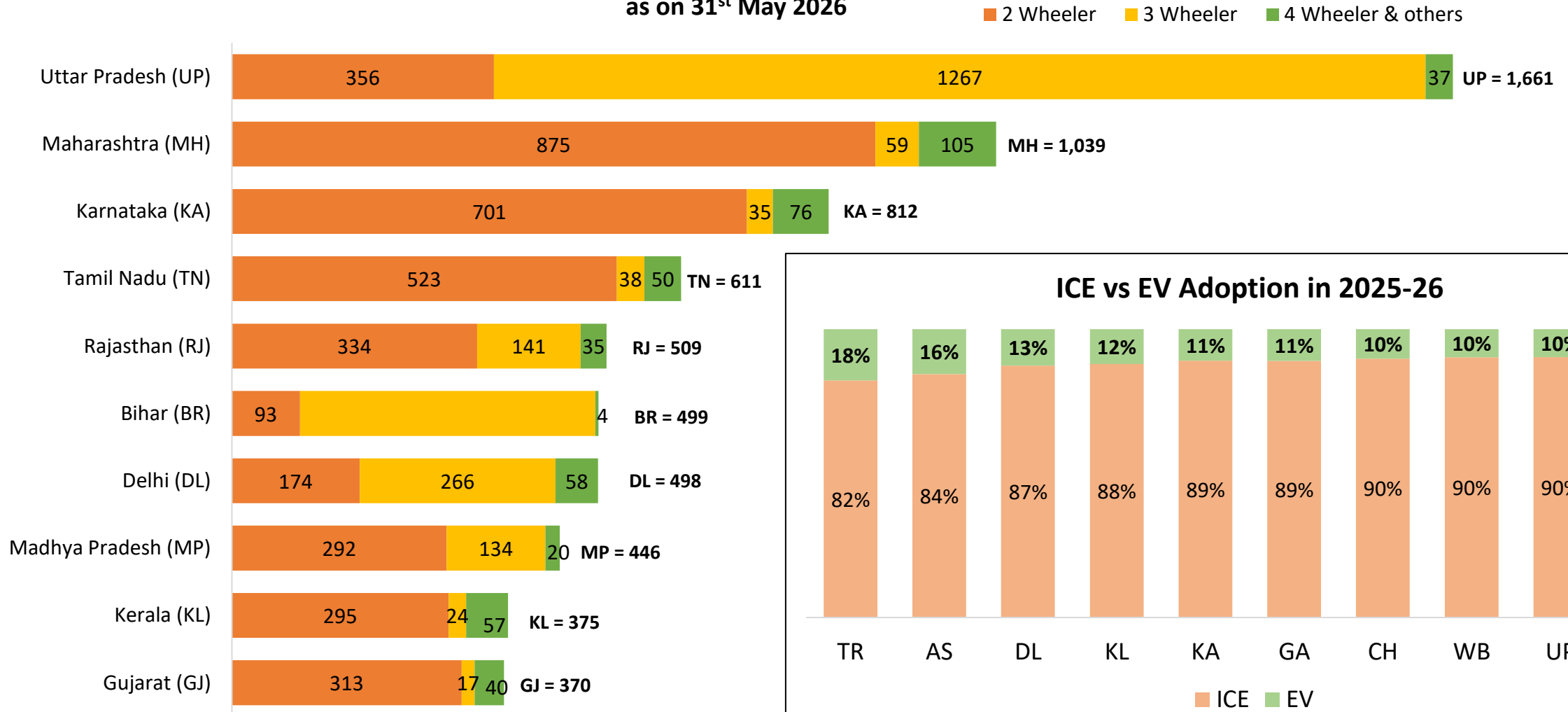


Prices of Gas (USD/MMBTU)				
Date	Henry Hub NG	Japan/ Korea LNG	Dutch TTF NG	IGX Trade
29-May-2026	3	18	14	18

Henry Hub NG Japan/ Korea LNG Dutch TTF NG IGX Trade

Status of Electric Mobility in India (2/2)

States with Highest Electric Vehicles Registered (in Thousands)
as on 31st May 2026



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](#) released 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.

The [Solar Parks and Ultra Mega Solar Power Projects](#) scheme has been extended by three years until March 2029, providing developers with more time to complete large-scale project

In [Union Budget 2026-27](#), ₹30,539.36 crore for solar energy.

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 (H₂)

[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 recorded a peak power demand of [271 GW on 21st May 2026 at 3:45 PM](#), with solar energy contributing 22% to meet the demand.
- [India and European Union launched €15.2 Million \(~₹169 Crore\) Joint Initiative to Strengthen EV Battery Recycling](#) under the India-EU Trade and Technology Council (TTC)-Working Group-2.
- [Indian Railways is set to launch India's first indigenous hydrogen-powered train on the Jind-Sonipat section](#), featuring a 10-car trainset powered by a 1.2 MW hydrogen fuel cell system.
- The Ministry of Power notified the [Jan Vishwas \(Amendment of Provisions\) Act, 2026](#), introducing key amendments to the Electricity Act, 2003, effective from 1 June 2026. The changes revise penalties for damage to electrical infrastructure, enhance fines for non-compliance with orders and remove certain obsolete provisions.



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