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MAGAZINE NOTES

Renewables Pass Coal: The Global Power Tipping Point of 2026

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ENVIRONMENT

GS3

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Renewables Pass Coal: The Global Power Tipping Point of 2026

 **Down to Earth** Chapter 4 · 3 min read ·

Feature analysis for Down To Earth July 2026, built from verified reporting and primary data.

A threshold that once looked distant has been crossed. In its mid-year update released in July 2026, the **International Energy Agency (IEA)** projected that **renewable electricity generation will overtake coal globally in 2026** for the first time, after reaching near parity in 2025. It is a milestone that reframes the energy transition from aspiration to arithmetic: clean power is now the largest source of new electricity, and increasingly of total electricity, on a surging global grid.

THE DEMAND SURGE THAT RENEWABLES MUST CHASE

The transition is happening on a moving target. The IEA expects **global electricity demand to grow 3.6 per cent in 2026 and 3.8 per cent in 2027**, driven by industry, electric vehicles, cooling, appliances and data centres. Meeting that growth while cutting emissions is the central challenge, and renewables are, for now, keeping pace.

IEA PROJECTION	FIGURE	MEANING
Global power demand growth, 2026	3.6 per cent	Cooling, EVs, data centres
Renewable generation growth, 2026	More than 8 per cent	Outpacing demand
Renewables' share of generation by 2027	About 37 per cent	Up from 33 per cent in 2025
Solar PV addition, 2026	About 600 TWh	Matches 2025 record
India electricity demand, 2026	Up about 7 per cent	Industry, services, cooling

Renewable generation is set to grow **more than 8 per cent in 2026**, lifting its share from **33 per cent in 2025 toward 37 per cent by 2027**. **Solar PV** is the engine: an addition of roughly **600 TWh** in 2026 is expected to let solar overtake wind and become the world's second-largest renewable source after hydropower.

INDIA IN THE FRAME

India's electricity demand is forecast to **rebound about 7 per cent in 2026**, powered by industrial activity, a growing services sector and heatwave-driven cooling load. This places India at the heart of the global story: it is one of the fastest-growing large electricity markets, and whether that new demand is met by coal or clean power will shape the trajectory of global emissions. India's ambitious solar and wind targets align with the IEA's direction of travel, but the pace of grid, storage and transmission build-out will decide how much coal the country can actually displace.

THE TRANSITION ON THE GROUND

The macro shift has a human face, captured in this issue's reporting on **electric buses transforming urban transport and driver livelihoods in Odisha**. The e-bus rollout shows how the energy transition reaches beyond power plants into mobility, air quality and jobs, offering cleaner commutes and new, formalised employment for drivers and operators. It is a concrete example of a **just transition**, the principle that decarbonisation should protect and create livelihoods rather than strand them.

THE UNFINISHED AGENDA

Overtaking coal in generation is not the same as retiring it. Coal capacity persists for grid stability, and the intermittency of solar and wind makes **energy storage, grid flexibility and transmission** the next binding constraints. The transition's success now hinges less on adding panels and more on integrating them: batteries, pumped hydro, demand response and smarter grids. There is also the water dimension flagged elsewhere in this issue, since the metals for this build-out carry their own environmental cost.

Way forward: accelerate storage and transmission alongside generation, plan an orderly and just wind-down of coal that protects workers and coal-dependent districts, and treat the renewables-over-coal crossover as the start of the hard phase, not the finish line.

UPSC ANGLE

This is a core **GS3** topic on energy security, infrastructure and climate commitments. Prelims-ready facts: the IEA projects **3.6 per cent** global demand growth in 2026, renewables overtaking coal, renewables' share rising toward **37 per cent by 2027**, and about **600 TWh** of new solar. For Mains, connect the crossover to India's net-zero-by-2070 pathway, the just-transition challenge in coal districts, and the storage-and-grid bottleneck, using the e-bus example to ground the argument in livelihoods.



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