THE STATE OF CLEAN POWER IN Q4 2025

Tom Taylor and Katherine Shok

March 2026

ATLAS PUBLIC POLICY

Environmental Defense Fund

Key Takeaways

New clean energy announcements

- In 2025, the United States saw a record 48.5 gigawatts (GW) of new clean power capacity come online—the equivalent of about 23 Hoover Dams. 217 GW (an estimated $372 billion in projects) of new clean power capacity is either planned or under construction, nearly five times as much as the 45 GW of planned and under construction fossil fuel capacity.
- Solar power and batteries dominate planned and under construction clean capacity at 85 percent of the total.
- There is more announced new battery capacity than battery capacity currently operating—66 GW in planned capacity compared to 43 GW operating in 2025.

Clean energy project cancellations and delays

- 13.4 GW of previously planned clean capacity was canceled in 2025. All clean energy—solar, batteries, onshore and offshore wind—had higher cancellation rates than natural gas projects. Offshore wind saw the greatest proportion of cancellations of planned capacity (14 percent), followed by onshore wind (12 percent) and battery storage (seven percent).
- An additional 12.8 GW of clean energy capacity that was expected to come online in 2025 was delayed; many projects are expected to now come online in 2026. This represents an over 20 percent reduction in the clean capacity that was expected to come online in 2025; note none of it was canceled.

Introduction

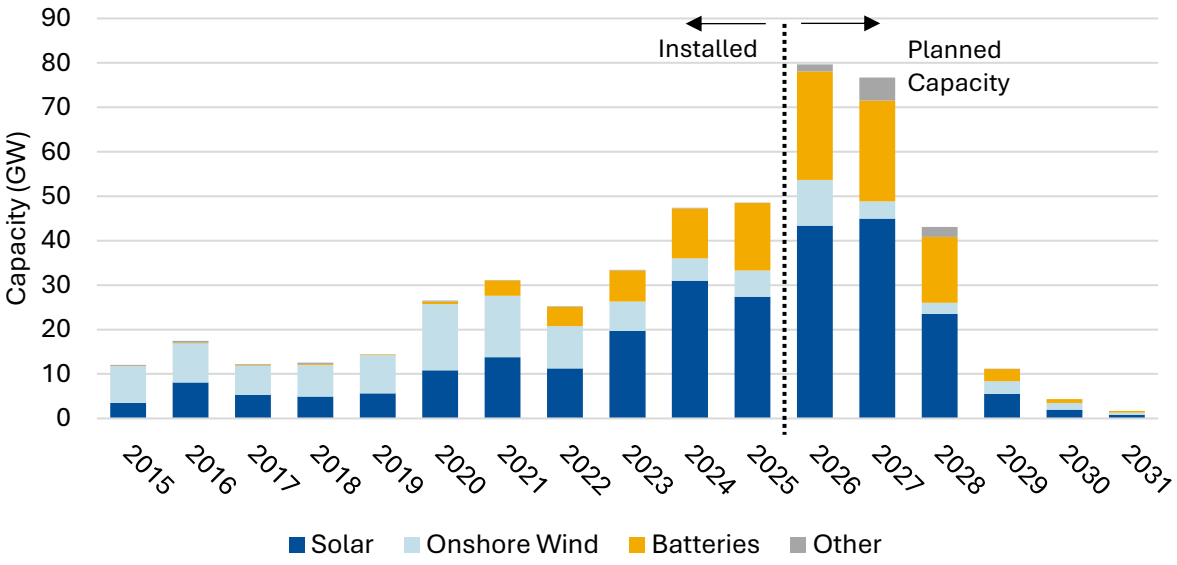
Demand for electricity in the United States is set to grow twice as fast over the next five years as it did in the previous decade. The power sector faces significant challenges in meeting this surge in demand while keeping energy affordable and reliable. Clean power is expected, and well positioned, to play a central role in supplying this growing demand. This brief provides an overview

of clean power capacity through the end of 2025 and complements previous analysis on the state of clean power in Q3 2025 and on clean energy manufacturing in Q3 and Q4 2025.[1]

Clean Power Capacity in 2025

New clean power capacity in the United States continues to rise. In 2025, a record 48.5 gigawatts (GW) of new clean power capacity came online in the United States—the equivalent of about 23 Hoover Dams[2] (Figure 1). Earlier in the year, over 60 GW of new clean capacity was expected to come online but 12.8 GW of capacity in clean generation projects shifted their timelines back. While none of these projects were canceled and many are expected to come online in 2026, it is noteworthy that more than 20 percent of the expected new clean capacity in 2025 did not come online per their original timelines. The total brought online in 2025 is at about the same level as 2024 and is almost double the clean capacity brought online in 2022 (Figure 1).

Figure 1: Additions of Clean Power Capacity (GW) by the Year the Power Comes Online



"Other" includes offshore wind, geothermal, and hydroelectric, predominantly. Data as of December 2025.

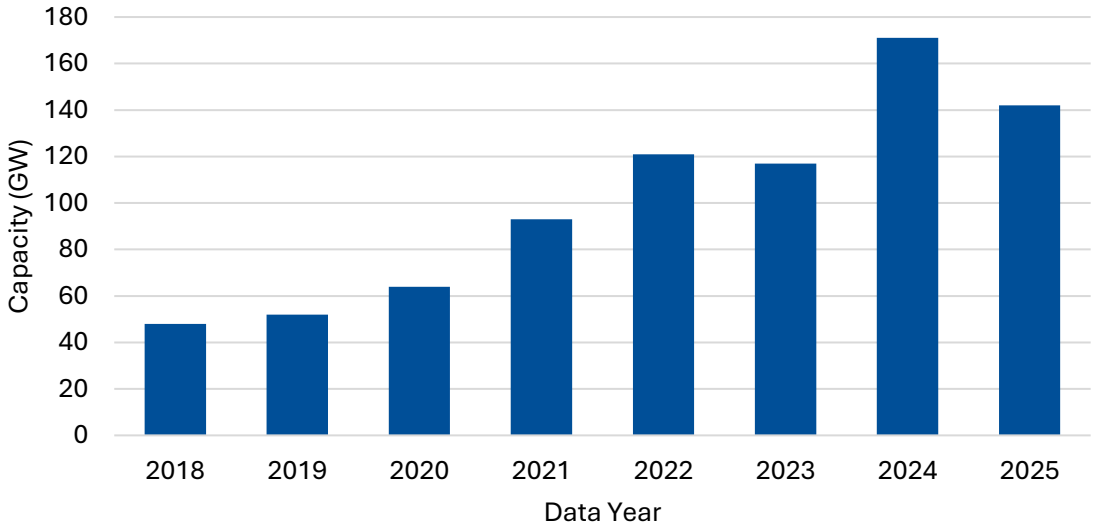
Source: Clean Economy Tracker

[1] "Clean power" includes batteries, geothermal, hydroelectric (both conventional and pumped storage), onshore wind, offshore wind, and solar (photovoltaic and thermal), and excludes nuclear generation or biomass. The data herein refers to "clean power capacity," encompassing both clean generation and battery storage. "Planned" refers to projects announced and under construction.

[2] The capacity of the Hoover Dam is approximately 2.1 GW.

Total planned capacity for clean energy rose steadily from 2018 to 2024, reaching 171 GW (Figure 2).[3] In 2025, however, momentum dipped and planned clean power capacity fell to 142 GW. Planned capacity may fail to come online for several reasons, including financing challenges, construction delays, policy or regulatory changes, and other developments that alter project timelines or expected generation capacity.

Figure 2: Planned Clean Power Capacity (GW) by Year Announced



Data year refers to December of the year in which data was reported.

Source: Clean Economy Tracker

Power demand and electricity rates are both expected to rise in coming years, increasing pressure on policymakers to keep electricity affordable. The growth comes amidst significant hostility from the federal government toward wind and solar power, including Department of Interior restrictions, cancellations of large projects, Congressional cuts and revisions to tax credits primarily for clean energy production investment and, in Q4 2025, Department of Energy (DOE) cuts to grant programs that support clean energy deployment. The Trump Administration's strategy for addressing energy affordability centers on extending the life of coal plants[4] and increasing oil and natural gas production. In fact, the largest DOE loan ever committed, $26.5 billion, was made in February 2026 to electric utilities in Alabama and Georgia to build new natural gas power plants.

[3] Unless otherwise noted, capacity figures refer to nameplate capacity and do not reflect actual output or utilization of these facilities, commonly measured by the capacity factor, which varies by technology.

[4] DOE announced in February 2026 that there was 17 GW of coal generation prevented from closure

Table 1: Nameplate Capacity and Average Output for Planned Projects and Projects Under Construction Announced Through the End of 2025

Technology	Nameplate Capacity (GW)	Average Capacity Factor for 2025	Average Output (GW)
Solar Photovoltaic	119.9	27%	**32.1**
Onshore Wind Turbine	21.7	46%	**9.9**
Offshore Wind Turbine	5.9	46%	**2.7**
Natural Gas – Combined Cycle	29.6	61%	**18.1**
Natural Gas – Other	15.2	20%	**3.0**

Capacity refers to nameplate capacity. Average Capacity Factor for 2025 is from the National Renewable Energy Laboratory's 2024 Annual Technology Baseline. Natural gas is included as a point of comparison. Natural gas estimates are taken from EIA's 2024 annual estimate. "Natural Gas – Other" includes all-natural gas capacity not included in Natural Gas – Combined Cycle and draws on the capacity factor of a steam turbine. Capacity factor does not consider projects that may be paired with battery storage.

Source: Clean Economy Tracker

Clean power capacity (planned, under construction, and operational) announced through 2025 adds up to 677 GW (including 13 GW of new capacity added in Q4 alone). Of all capacity, a third (217 GW) is planned or under construction. In comparison, net power capacity from fossil fuels (natural gas, coal, and petroleum liquids) announced or operational through 2025 is roughly 842 GW and may rise further given the pattern of strong federal support for the buildout of fossil fuel energy. Looking only at future capacity, there is 217 GW of planned and under construction clean capacity compared with 45 GW of planned and under construction fossil fuel capacity.[5] In total, developers will invest an estimated $372 billion in planned and under construction clean power capacity through 2031.[6]

In Table 1, leading technologies are multiplied by a capacity factor to produce average output.[7] Clean technologies have a lower capacity factor but remain the majority of planned and under construction capacity based on average output. Planned and under construction solar capacity has nearly twice the expected average output as planned combined cycle natural gas.

[5] There is also less than 1 GW of other planned capacity, principally nuclear and biomass.

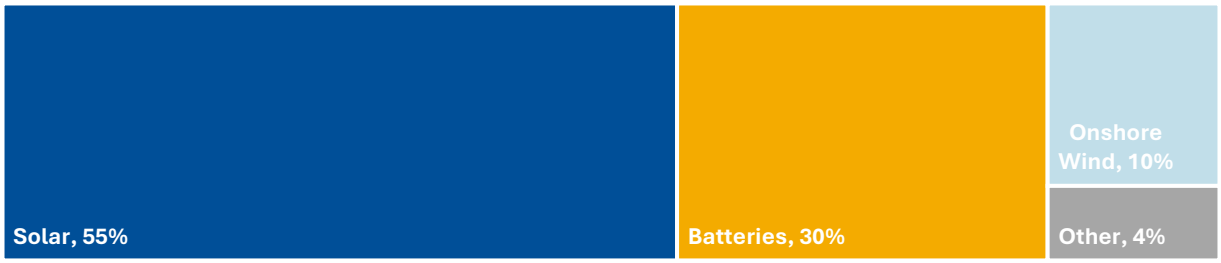
[6] Refer to the Clean Economy Tracker Methodology for more on how we estimated investments and jobs.

[7] The National Renewable Energy Laboratory estimates that for 2025, capacity factor for utility scale technologies (not including residential solar) ranges from 27 percent for utility scale solar to 93 percent for nuclear generation.

Solar and Batteries Dominate Planned Clean Capacity

Looking only at planned, not-yet-operational clean power capacity including projects announced and under construction, solar and batteries dominate all other clean technology with 85 percent of all planned clean power capacity (Figure 3).[8] These planned projects represent significant economic opportunity: planned solar projects will lead to an estimated $176 billion in investment, and batteries to an additional estimated $113 billion. Both solar and batteries are seeing unprecedented levels of growth from relatively small baselines in the United States. Planned and under construction battery capacity expected to come online in the next five years exceeds total currently operating battery capacity (66 GW planned capacity compared with 43 GW operating capacity as of Q4 2025). Geothermal and hydroelectric planned and under construction capacity is far more limited, with just 3 GW total.

Figure 3: Planned and Under Construction Clean Power Capacity by Technology at the End of 2025 (GW)



"Other" includes offshore wind and hydroelectric, predominantly.

Source: Clean Economy Tracker

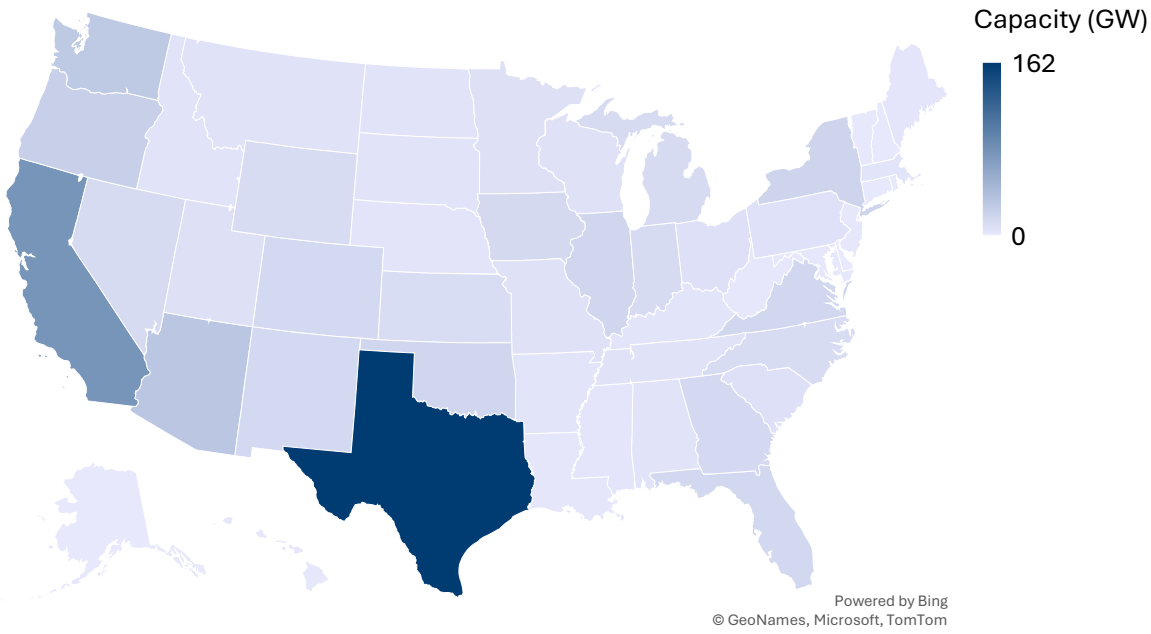
Texas Continues to Lead All States in Clean Capacity

As of the end of 2025, Texas leads all states for clean power capacity (planned, under construction, and operational) (Figure 4). Texas has more than double the existing clean power capacity of the next state, California (162 GW compared to 79 GW). Texas leads the country in power capacity for solar photovoltaic (69 GW), onshore wind (48 GW), and batteries (44 GW). Likewise, three of the top five Congressional districts in the country for clean power capacity are in Texas (Figure 5). TX-19

[8] Batteries do not generate their own electricity and so battery capacity should be considered complementary but not equivalent to other technologies that generate electricity.

leads all districts in clean energy capacity (28 GW), with two-thirds of that capacity already operational.

Figure 4: States with the Most Clean Power Capacity through 2025 (GW)

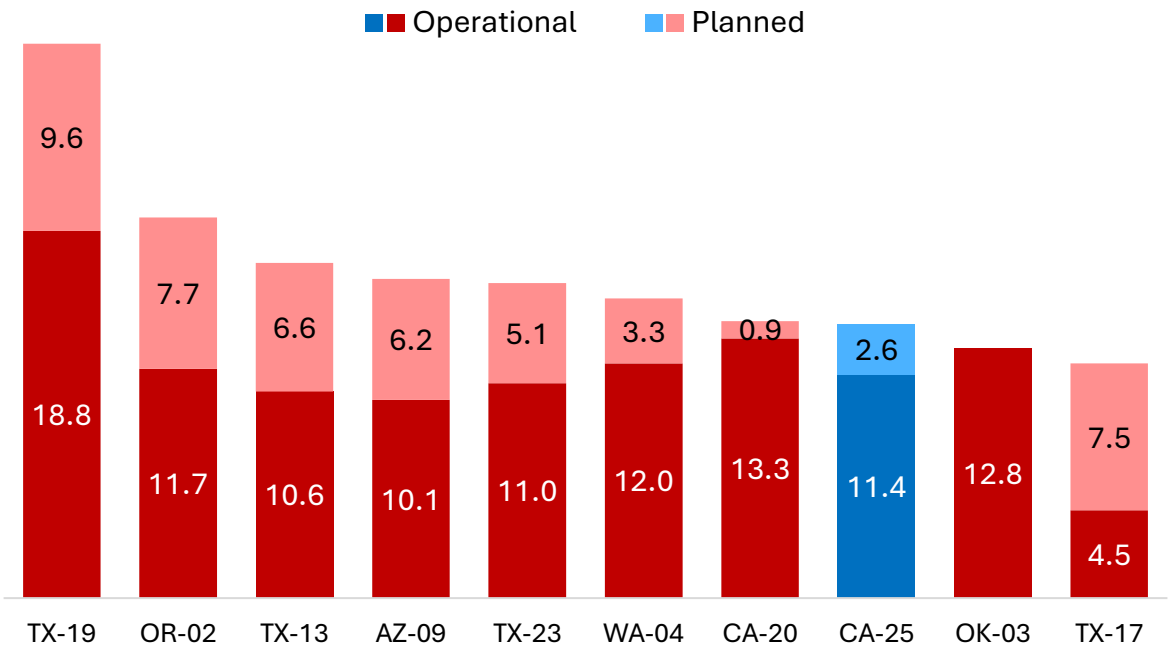


The map shows the total clean capacity by state (planned, under construction, and operational). The darker the shade of blue, the larger the power capacity. “Capacity” refers to nameplate capacity.

Source: Clean Economy Tracker

Across the United States, 80 percent of existing, under construction, and planned clean energy capacity is in House districts represented by Republicans (Figure 5). Of the 30 districts with the highest clean energy capacity, only three are represented by Democrats: CA-25, TX-28, and NM-01. CA-25 is the only Democratic-represented district with clean power capacity over 10 GW (Figure 5).

Figure 5: Clean Power Capacity by Congressional District through Q4 2025 (GW)



Red refers to a Republican represented House Congressional District and blue refers to Democratic. Darker shades refer to operational capacity and lighter shades refer to planned capacity (which includes capacity under construction). Congressional districts are based on the 119th Congress. This does not include the six GW of offshore wind capacity in the United States, most of which is planned or under construction.

Source: Clean Economy Tracker

Wind Projects Face the Biggest Headwinds

In total, 13.4 GW of previously planned clean power capacity was canceled in 2025 (Table 2), including four GW in Q4 2025 alone. A higher rate of cancellations in certain technologies might indicate challenges unique to those industries. All clean technologies tracked in Table 2 had higher cancellation rates than natural gas projects. Wind projects, and particularly offshore wind projects, were canceled the most in 2025, relative to their total planned and under construction capacity. Onshore wind saw 2.9 GW (12 percent of total planned capacity) in capacity cancellations, and offshore wind faced one GW of cancellations (14 percent). Battery projects have also seen significant cancellations in 2025, at 4.9 GW of capacity (seven percent). Solar and natural gas projects have seen fewer cancellations relative to total planned capacity at 4.6 GW (four percent) and 1.5 GW (three percent), respectively.

Table 2: Planned and Under Construction Capacity and Capacity Cancellations in 2025

Technology	Total Planned Capacity (GW)	Cancellations in 2025 (GW)	Share of Canceled Projects
Solar	119.9	-4.6	4%
Batteries	65.9	-4.9	7%
Onshore Wind	21.7	-2.9	12%
Offshore Wind	5.9	-1.0	14%
Natural Gas	44.8	-1.5	3%

Represents cancellations from January 2025 through December 2025. "Planned" includes projects under construction and announced as of December 2025. "Cancellations" do not include retired projects. "Natural gas" is included as a point of comparison and includes the following technologies: natural gas fired combined cycle, natural gas fired combustion turbine, natural gas internal combustion engine, natural gas steam turbine, and other natural gas. Solar includes photovoltaic and thermal. The proportion of canceled projects equals cancellations divided by the total of planned and under construction capacity and cancellations.

Source: Clean Economy Tracker

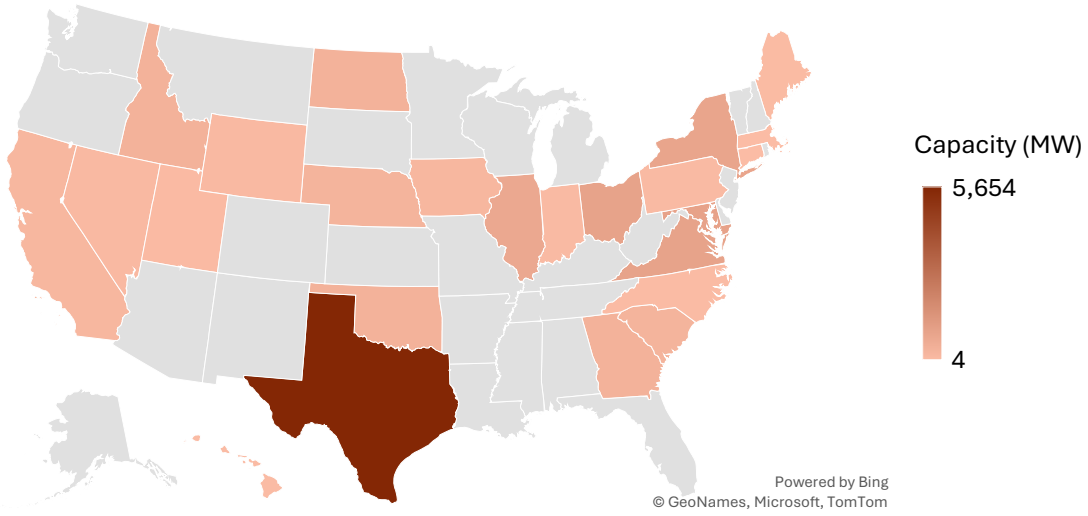
In the United States, 97 percent of expected offshore wind capacity was under construction at the end of 2025. Most offshore wind developments have faced significant barriers from Trump Administration attempts to end offshore wind generation, however, all five wind farms halted by Trump administration actions in 2025 were able to resume construction following federal court rulings in early 2026. In March 2026, two of the wind farms impacted by court rulings announced important developments. Representatives for Vineyard Wind (supplying Massachusetts) announced the completion of construction on that project, while representatives for Revolution Wind (supplying Connecticut and Rhode Island) announced the project had begun to supply power to the grid, though construction is not yet complete. The two projects have a combined capacity of 1.5 GW.

States Hit Hardest by Investment Cancellations

While Texas has more planned new clean power capacity than any other state, it also leads the nation in project cancellations (Figure 6). In 2025, the state saw about 5.7 GW of canceled clean power capacity, mostly canceled battery capacity, including 2.7 GW reported in Q4 2025 alone. However, this amounts to less than four percent of all planned and under construction clean power capacity in Texas. Maryland and Virginia experienced the second most cancellations, a combined 1.9 GW, due in large part to offshore wind cancellations in Maryland and solar cancellations in

Virginia. Maryland, Nebraska, North Dakota, and Idaho experienced the largest proportions of canceled clean capacity in 2025 as a percentage of planned and under construction clean capacity; the bulk of these cancellations are onshore and offshore wind projects.

Figure 6: Announced Power Capacity Cancellations by State in 2025 (MW)

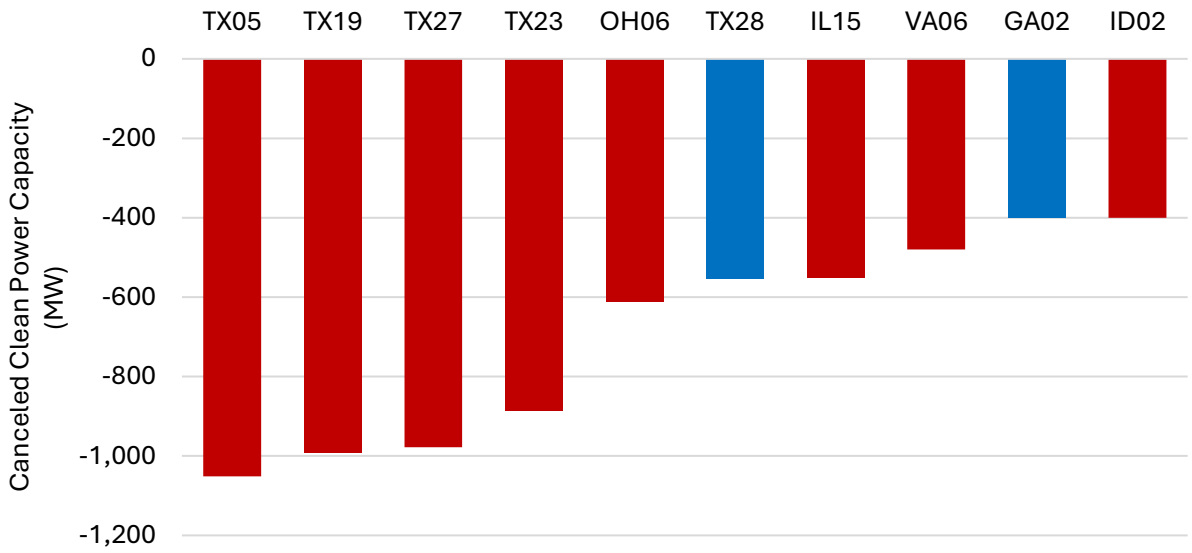


The darker the shade of reddish-brown, the greater the level of cancellations, in MW. States with gray fill have no publicly announced cancellations. “Capacity” refers to nameplate capacity.

Source: Clean Economy Tracker

As seen in Figure 7, TX-05 has seen more cancellations in 2025 than any other district and saw a mix of solar and battery storage projects canceled. Projects canceled in TX-05 represented $1.8 billion in estimated investments and more than 5,200 construction jobs. More broadly, canceled clean power projects would have created an estimated 45,000 construction jobs.

Figure 7: Largest Clean Power Capacity Cancellations by Congressional District in 2025



Red refers to a Republican represented House Congressional District and blue refers to Democratic. Congressional districts are based on the 119th Congress. This figure does not include projects not mapped to a district, principally 1 GW of offshore wind in Maryland.

Source: Clean Economy Tracker

Conclusion and Looking Ahead

2025 marked a pivotal year for clean power deployment in the United States with continued growth in new clean power capacity despite increasing challenges due to new federal policy. New clean power capacity is still dominated by two technologies, solar and batteries, and one state, Texas. While capacity overall has risen, the clean power sector faced significant obstacles, notably policy headwinds that led to significant project cancellations, particularly for wind power. These political and policy headwinds have already led to a fall in planned clean power capacity expected in coming years.

These trends underscore both the resilience of, and challenges ahead for, clean power, highlighting the need for continued innovation, supportive policies, and strategic investment to meet rising electricity demand and ensure affordable, reliable power for the future.

Methodology

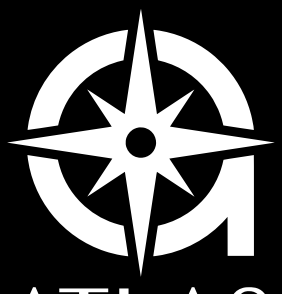
Data was pulled from the Clean Economy Tracker on February 9, 2026. Technology includes batteries, geothermal, hydroelectric (including conventional hydropower and hydroelectric pumped storage), onshore wind, offshore wind, solar photovoltaic, and solar thermal. According to the U.S. Energy Information Administration (EIA), nameplate capacity refers to the maximum rated output of a generator designated by the manufacturer, expressed in gigawatts. Operational includes currently operating, standby/backup, and temporarily out of service facilities. Planned refers to announced and under construction facilities. Cancellations do not include retired projects.

The data are from the EIA Annual Electric Generator Report (Form EIA-860), for the years that are available. Where annual data are not yet available, the data are from the EIA Preliminary Monthly Electric Generator Inventory (Form EIA-860M), which are considered preliminary estimates and subject to change; a delay of approximately six months exists between the end of the year and when the data becomes available. Note that there could be delays between when a project is planned (or canceled) by a developer and when the change is reflected in the monthly data. The dataset only includes projects one megawatt or larger. The first clean energy projects in the data begin pre-1900 (all hydroelectric until the 1970s), however most clean power capacity on the grid is new.

Investment figures refer to the estimated capital expenditure to build each clean generator in 2024 dollars and apply to projects from 2013 onwards. These values may not correspond to actual past or future investment by project developers but are an approximation. Capital expenditure is estimated by multiplying the nameplate capacity of each project by CAPEX multipliers from the National Renewable Energy Laboratory 2024 Annual Technology Baseline, considering the technology type and operating year. Values are converted to 2024 dollars using Consumer Price Index Data from the Bureau of Labor Statistics. See the full methodology here.

Acknowledgments

Atlas Public Policy thanks the Environmental Defense Fund for its support of this work. The content, findings, and conclusions contained herein are Atlas Public Policy's alone. References to specific products are included for informational purposes only and should not be construed as actual or implied endorsements.



ATLAS
PUBLIC POLICY
WWW.ATLASPOLICY.COM