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THE STATE OF CLEAN POWER IN Q1 2026

Tom Taylor, Katherine Shok, and Matthew Vining

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Contents

Key Takeaways

- Clean power capacity in the United States is ramping up significantly. The 222 gigawatts (GW) of clean power capacity currently planned or under construction amounts to roughly one-third of cumulative capacity announced through Q1 2026 (693 GW). Developers added eight GW of operational capacity in Q1 2026 alone.
- At the end of Q1 2026, fossil fuel generation sources accounted for 27 percent of planned capacity, compared to just nine percent at the end 2022, a threefold increase that points to an uptick in fossil fuel generation investment.
- Solar and batteries dominate all other clean technologies, comprising 85 percent of all clean power capacity and presenting an economic opportunity. Developers have announced plans to invest an estimated $377 billion in new clean power capacity through 2031.
- Developers canceled more than eight GW of planned clean energy capacity in Q1 2026. More than half of the canceled capacity—4.7 GW—was for solar projects. All clean technologies had higher cancellation rates than natural gas projects, except for onshore wind.
- Texas leads all states in planned, under construction, and operational clean power capacity, with nearly twice as much capacity as the second-ranked state, California.

Introduction

The U.S. Energy Information Administration (EIA) projects electricity generation in the United States will increase by 25 to 50 percent from 2025 through 2050. The power sector faces significant challenges in meeting this demand increase while keeping energy affordable and reliable. Clean power is expected, and well positioned, to play a central role in meeting this growing demand. This brief provides an overview of clean power capacity through the first quarter of 2026 and complements previous analysis on the state of clean power in Q3 and Q4 2025, as well as on clean energy manufacturing in Q3 and Q4 2025 and Q1 2026.[1]

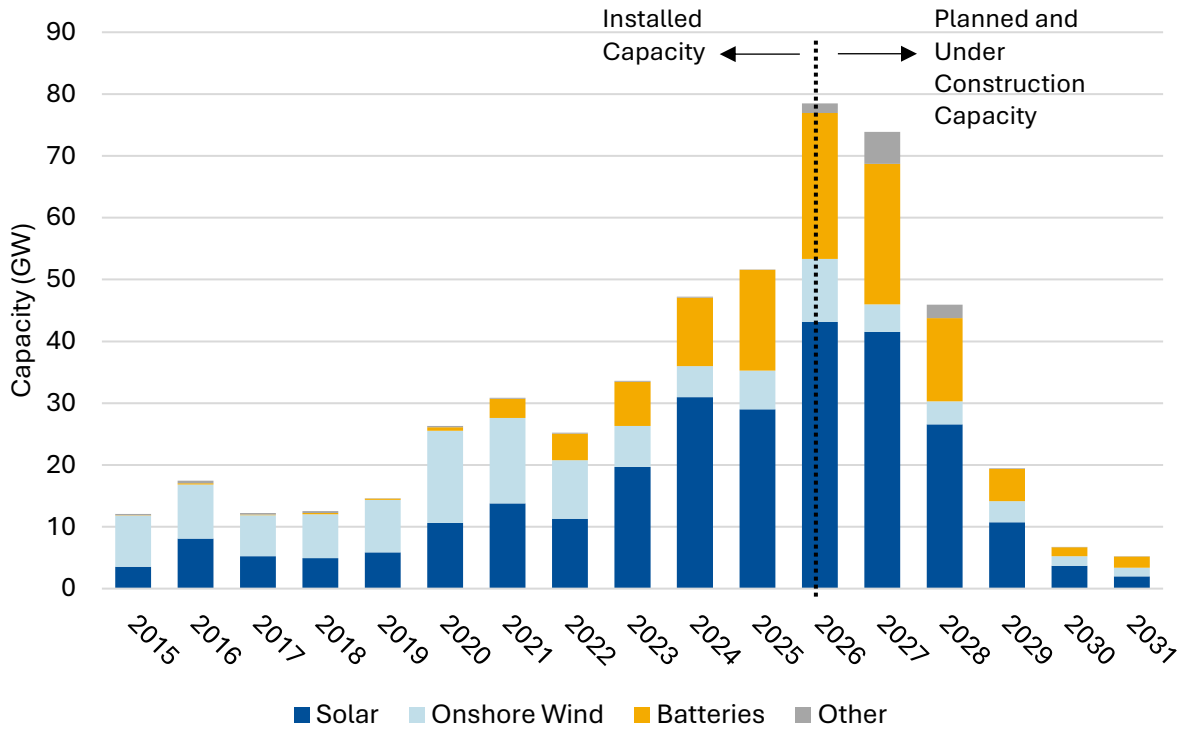
Clean Power Capacity in 2026

There are 471.1 GW of operational clean power capacity in the United States as of the first quarter of 2026. In 2025, a record 51.6 GW of new clean power capacity came online domestically—the equivalent of about 25 Hoover Dams[2] (Figure 1). Thus far in 2026, eight GW of new clean power capacity has come online, 4.4 GW from solar, 3.2 GW from batteries, and 0.6 GW from wind. An additional 221.6 GW in capacity is currently planned or under construction to come online through 2031. Of this total, 79.7 GW—approximately 37 percent of cumulative announced planned or under construction capacity—is expected to come online in 2026. Solar, at 123.3 GW, makes up nearly 56 percent of planned or under construction clean capacity, with batteries following at 65.1 GW or 29 percent. Wind represents the bulk of remaining clean power planned or under construction capacity at 30 GW or 14 percent.

[1] "Clean power" includes batteries, geothermal, hydroelectric (both conventional and pumped storage), onshore wind, offshore wind, and solar (photovoltaic and thermal), but excludes nuclear generation or biomass. The data herein refers to "clean power capacity," encompassing both clean generation and battery storage. Data is subject to change based on updates provided by EIA.

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

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



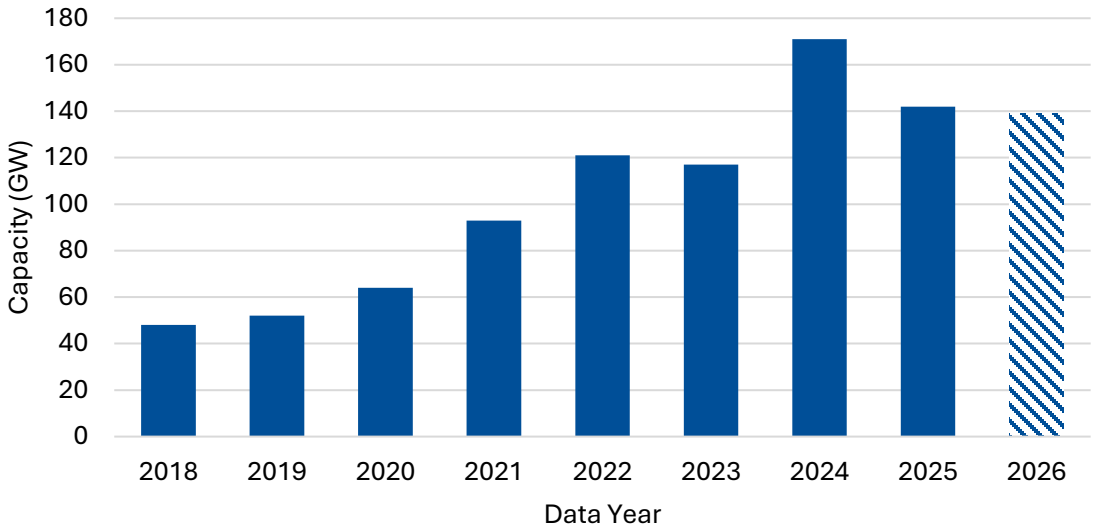
"Other" includes offshore wind, geothermal, and hydroelectric. Solar includes photovoltaic and thermal. Data as of March 2026.

Source: Clean Economy Tracker

Total planned capacity for clean power rose steadily from 2018 to 2024, reaching 171 GW in 2024 (Figure 2).[3] In 2025 and into 2026, planned clean capacity has dropped slightly, though data is only available through Q1 2026 and a full comparison across years requires data through the end of the year. Meanwhile at the end of Q1 2026, fossil fuel generation sources accounted for 27 percent of planned capacity, compared to just nine percent at the end 2022, a threefold increase that points to an uptick in fossil fuel generation investment. Not all planned capacity ultimately reaches completion, however. Projects may fail to come online for several reasons, such as financing challenges, construction delays, policy or regulatory changes, and other developments that affect timelines or expected generation capacity.

[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.

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



Data year refers to the total planned capacity as of December each year, except for 2026, which reflects data from March 2026. Does not include operational or under construction capacity.

Source: Clean Economy Tracker

With power demand and electricity rates both expected to rise in coming years, policymakers face increasing pressure to keep electricity affordable. The growth comes amid efforts by the federal government to hinder wind and solar power, including Department of the Interior (DOI) changes that would make it harder to permit solar and wind power, cancellations and delays of major projects, and Congressional actions to scale back or revise tax credits primarily for clean energy generation and production.

In Q1 2026, the Trump administration offered companies up to $2 billion to cancel offshore wind projects and redirect investment into oil and gas. In Q1 2026, reports of many delayed federal agency approvals for clean power projects on both federal and private land emerged, stemming from the DOI review requirements and restrictions. Additional pressure and energy supply bottlenecks stem from the war with Iran, increasing the costs of fuels and electricity prices. Also, the Trump administration has focused on extending the life of coal plants,[4] increasing oil and natural gas production, and championing nuclear energy development.

[4] U.S. Department of Energy 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 Q1 2026

Technology	Nameplate Capacity (GW)	Average Capacity Factor	Average Output (GW)
Solar Photovoltaic	123.1	26.9%	**33.0**
Onshore Wind Turbine	24.1	46.2%	**11.0**
Offshore Wind Turbine	5.9	46.6%	**2.7**
Hydroelectric	3.0	33.0%	**1.0**
Natural Gas – Combined Cycle	45.0	58.4%	**26.3**
Natural Gas – Other	20.5	19.8%	**4.1**

Capacity refers to nameplate capacity for all technologies with more than one GW of planned and under construction capacity. For clean technologies, "Average Capacity Factor" is for 2026 from the National Laboratory of the Rockies 2024 Annual Technology Baseline. Natural gas is included as a point of comparison, with capacity factor estimates drawn from the EIA's 2025 annual estimate data as the most recent annual data. "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 (e.g. hydroelectric pumped storage).

Source: Clean Economy Tracker

Clean power capacity (planned, under construction, and operational) announced through Q1 2026 totals 693 GW, including eight GW of operational capacity added in Q1 2026. About 32 percent or 222 GW is planned or under construction. Developers plan to invest an estimated $377 billion in clean power capacity through 2031.[5] By comparison, announced and operational fossil fuel capacity (natural gas, coal, and petroleum liquids) over the same period is about 844 GW, with 66 GW of fossil fuel capacity currently planned or under construction, almost all of which is natural gas.[6]

Table 1 applies a *capacity factor* to each leading technology to measure the amount of electricity a facility produces relative to its maximum (nameplate) potential, thereby establishing average output—the mean amount of energy generated over a typical year.[7] Clean technologies have a

[5] Refer to the Clean Economy Tracker Methodology for more on investment and job estimates.

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

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

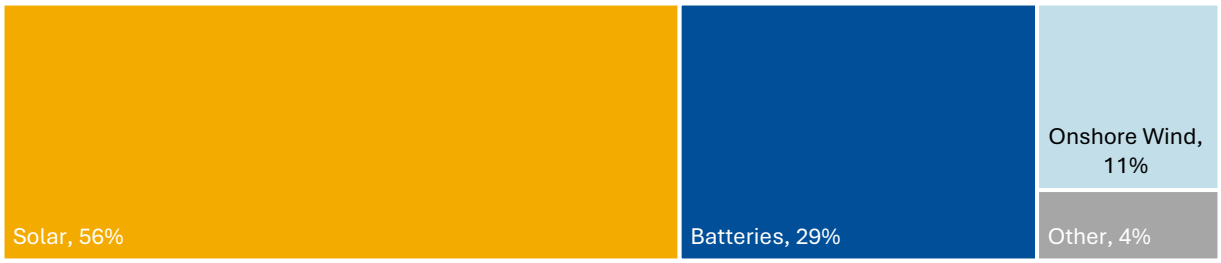
lower capacity factor but remain the majority of planned and under construction capacity based on average output. Planned and under construction solar capacity has similar expected average output as natural gas.

Solar and Batteries Dominate Planned Clean Capacity

Looking only at planned and under construction capacity, solar and batteries dominate all other clean technologies with 56 percent and 29 percent respectively (Figure 3).[8] These projects represent significant economic opportunity: planned and under construction solar projects will result in an estimated $179 billion in investment, and batteries an estimated $110 billion.

Battery storage technology in the United States is seeing unprecedented levels of growth from a relatively small baseline. Planned and under construction battery capacity expected to come online in the next five years already exceeds today's operational battery capacity, with 65 GW of planned and under construction capacity compared to 47 GW online as of Q1 2026. Planned and under construction onshore wind capacity, however, sits at 30 GW compared to 160 GW online now, pointing to limited growth. For solar, there is large planned and under construction capacity, 123 GW, but also large capacity online, 158 GW. By contrast, planned and under construction geothermal and hydroelectric capacity remain modest, totaling just over three GW.

Figure 3: Planned and Under Construction Clean Power Capacity by Technology, Q1 2026



"Other" includes offshore wind and hydroelectric, predominantly.

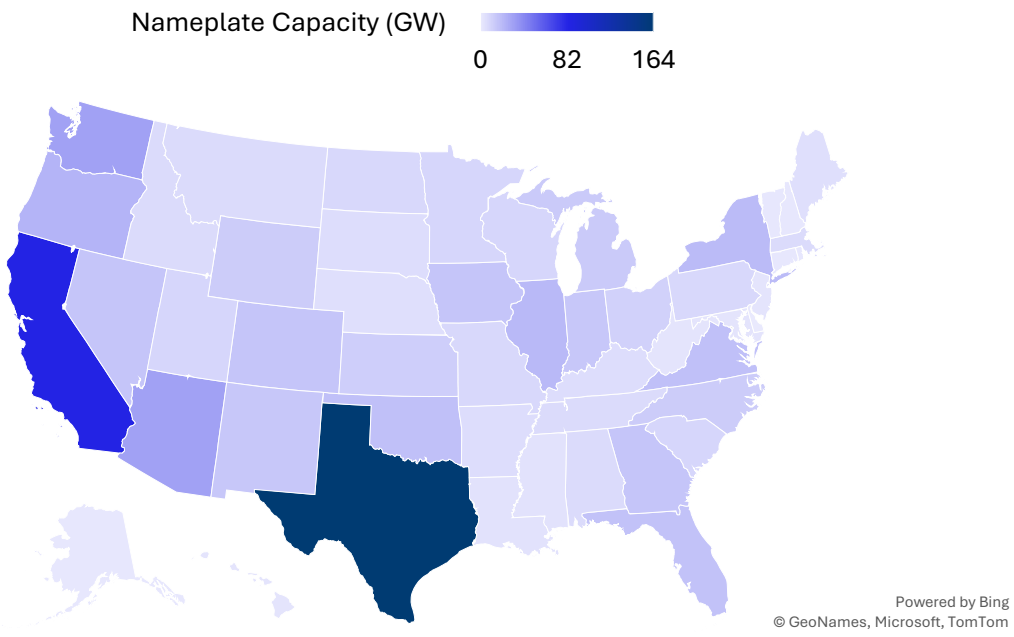
Source: Clean Economy Tracker

[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.

Texas Continues to Lead All States in Clean Capacity

As of the end of Q1 2026, Texas has more planned, under construction, and operational clean power capacity than any other state (Figure 4). With 164 GW, Texas has nearly twice as much clean power capacity as the second-ranked state, California, at 83 GW. Texas leads the country in power capacity for solar photovoltaic (70 GW), onshore wind (49 GW), and batteries (44 GW). Three of the country's five congressional districts with the most clean power capacity are in Texas (Figure 5), led by TX-19 with 22 GW of capacity, about two-thirds of which is already online. Washington state leads the country in hydroelectric capacity (22 GW) and California in geothermal (3 GW).

Figure 4: States' Total Clean Power Capacity through Q1 2026 (GW)

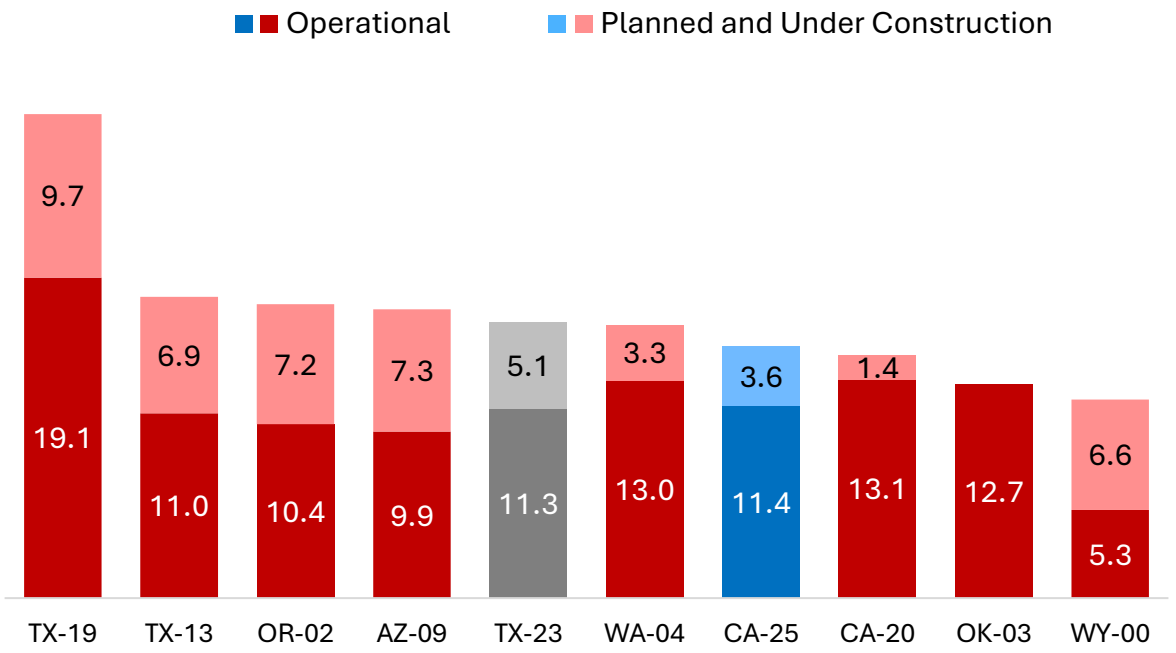


The map shows the total clean capacity by state (planned, under construction, and operational). The darker the shade of blue, the larger the power capacity. "Capacity" refers to nameplate capacity.

Source: Clean Economy Tracker

Across the United States, 80 percent of existing, planned and under construction clean power capacity is located within congressional districts represented by Republicans. Of the 30 districts with the highest clean power capacity, only five are represented by Democrats: CA-25, CA-13, TX-28, NM-01, and NV-04. 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 Q1 2026 (GW)



Red refers to a Republican represented House congressional district and blue refers to a Democratic represented District. Gray indicates the seat is vacant as of June 2026. Darker shades refer to operational capacity and lighter shades refer to planned and under construction capacity. Congressional districts are based on the 119th Congress. This figure does not include projects not mapped to a district.

Source: Clean Economy Tracker

Wind Power Continues to Face Uncertainty

In Q1 2026, energy developers canceled eight GW of previously planned or under construction clean power capacity (Table 2), with solar projects accounting for more than half of canceled capacity. Canceled solar capacity in Q1 represented only four percent of total planned and under construction solar projects, while battery cancellations totaling 3.1 GW represented five percent of the total planned and under construction battery projects. Both had higher cancellation rates than natural gas and onshore wind projects.

Elevated cancellation rates in specific technologies may signal sector-specific challenges, such as supply chain constraints, permitting delays, or financing issues. At the same time, developers sharply expanded plans for natural gas capacity in early 2026: total planned and under construction natural gas capacity rose from 44.8 GW in Q4 2025 to 65.5 GW by the end of Q1 2026, an increase of 20.7 GW. Note that EIA appears to report cancellation updates more regularly in Q1

2026, so spikes during this period may reflect reporting timing rather than an actual increase in cancellations.

Table 2: Planned and Under Construction Capacity Compared to Cancellations in Q1 2026

Technology	Total Planned & Under Construction Capacity (GW)	Change in Planned Capacity in Q1 2026 (GW)	Cancellations in Q1 2026 (GW)	Share of Planned Capacity Canceled
Solar	123.3	+3.4	-4.7	4%
Batteries	65.1	-0.8	-3.1	5%
Onshore Wind	24.1	+2.4	-0.2	1%
Natural Gas	65.5	+20.7	-0.6	1%

Represents cancellations from January 2026 through March 2026. “Cancellations” do not include retired projects. “Natural gas” 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. Change in planned and under construction capacity reflects change in the underlying data, not in previous report as the underlying data may be revised by EIA. These are the only technologies with cancellations recorded in Q1 2026.

Source: Clean Economy Tracker

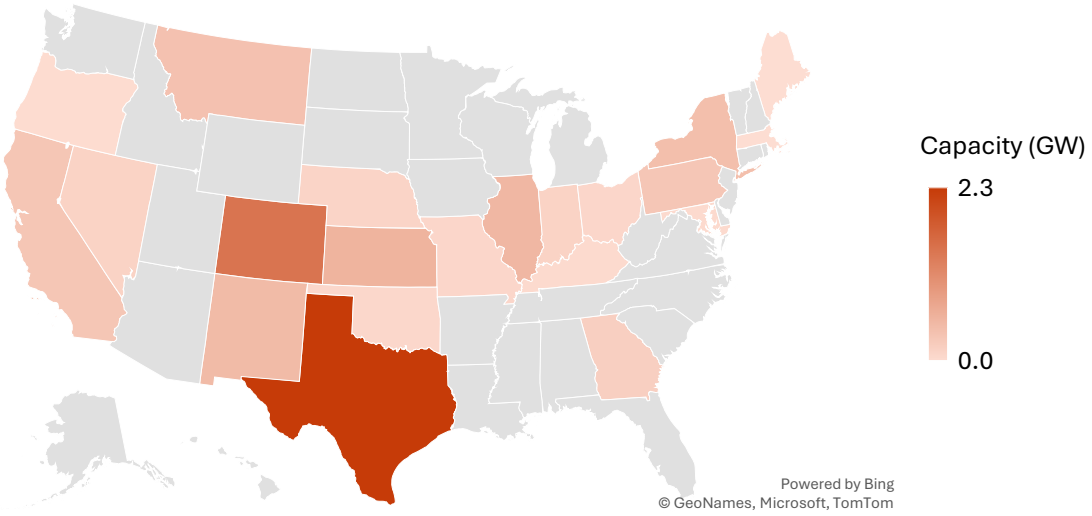
Wind projects have faced continual difficulties in recent years, and that may continue in 2026 despite a rebound in planned onshore wind. Onshore wind net power capacity additions peaked in 2020 with 14.9 GW, before falling annually until 2024 with 5.2 GW of net capacity added. In 2026, 11.7 GW of capacity is planned to come online, of which 3.7 GW is slated to begin generation in New Mexico, thereby continuing the geographic concentration trend of onshore wind on the Great Plains. This rebound is complicated by a U.S. Department of Defense action in May 2026 to halt a review of more than 150 onshore wind projects.[9] The 30 GW of capacity contained in those projects is effectively stalled without Pentagon approval.

[9] The Pentagon requires review of such projects to ensure installed turbines will not warp military radars or require changes in flight paths.

Texas Leads in New Power and Cancellations in 2026

Alongside more planned and under construction new clean power capacity than any other state, Texas continues to lead the nation in project cancellations (Figure 6). In the first three months of the year, the state saw about 2.3 GW of canceled clean power capacity. In all of 2025, Texas recorded 5.4 GW of cancellations. However, cancellations in the first three months of 2026 amount to just three percent of all planned and under construction clean power capacity in Texas. The canceled projects in Texas amounted to an estimated $3.8 billion in investment and would have produced an estimated 10,800 construction and operations jobs.

Figure 6: Announced Clean Power Capacity Cancellations by State in Q1 2026

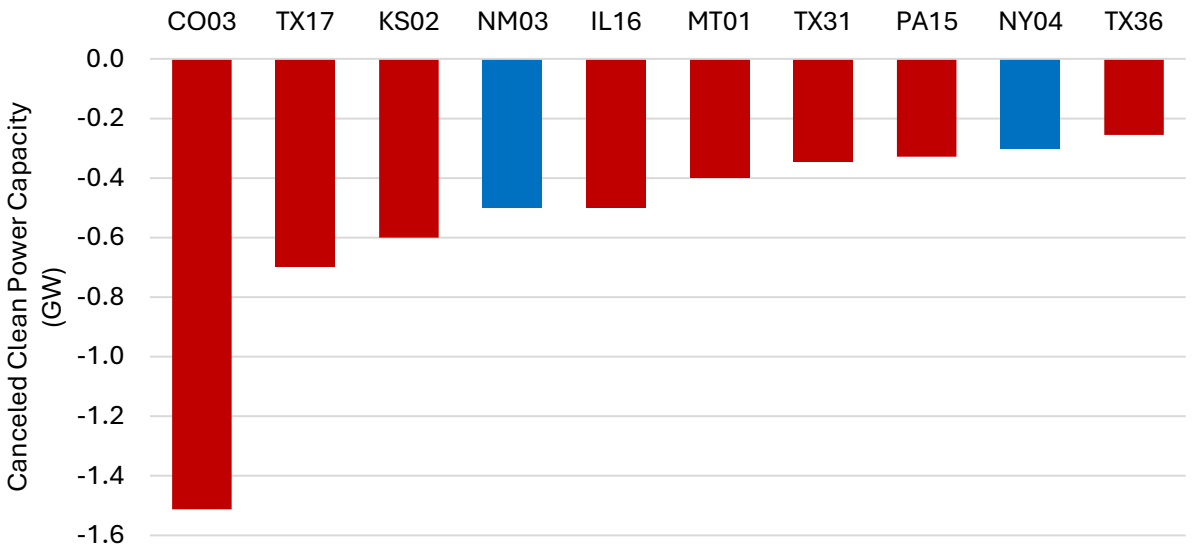


The darker the shade of red, the greater the level of cancellations in GW. States with gray fill have no publicly announced cancellations. “Capacity” refers to nameplate capacity.

Source: Clean Economy Tracker

Colorado also experienced significant clean power project cancellations in 2026. Over 1.5 GW were canceled, all of which stemmed from canceled solar and battery capacity. Those cancellations represent 38 percent of all planned and under construction clean capacity in the state. As seen in Figure 7, CO-03 has seen more cancellations in 2026 than any other district, with a mix of solar and battery storage projects canceled. Projects canceled in CO-03 represented $2.5 billion in estimated investments and almost 7,000 construction jobs. More broadly, canceled clean power projects would have created an estimated 33,600 construction jobs and represented an estimated $13 billion in investment.

Figure 7: Largest Clean Power Capacity Cancellations by Congressional District in Q1 2026



Red refers to a Republican represented House congressional district and blue refers to a Democratic represented District. Congressional districts are based on the 119th Congress. This figure does not include projects not mapped to a district.

Source: Clean Economy Tracker

Conclusion and Looking Ahead

Clean power generation continues to be added to the grid, with solar and battery storage accounting for the largest share of new power capacity. Onshore wind generation seemed poised to rebound with the most capacity coming online since 2021; however, efforts by the federal government continue to stymie projects. Since the start of 2025, 21.2 GW of clean power has been canceled. Challenges remain, particularly from rising power demand and electricity rates, and the increasing desire from policymakers to tackle electricity affordability. Federal approvals for clean power projects on federal and private land have been repeatedly delayed, and the war with Iran brings additional pressure on energy prices. While it is still early, the beginning of 2026 largely sees a continuation of the challenges faced in 2025.

Methodology

Data was pulled from the Clean Economy Tracker on May 20, 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 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. Projects may also be planned or under construction. 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 power projects in the data begin pre-1900 (all hydroelectric until the 1970s), however most clean power capacity on the grid is new. Canceled refers to projects that are canceled or indefinitely paused.

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 Laboratory of the Rockies 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

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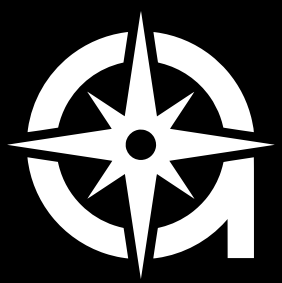

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