THE STATE OF CLEAN POWER IN Q3 2025

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January 2026

ATLAS PUBLIC POLICY

Environmental Defense Fund

Key Takeaways

- By the end of 2025, the United States is expected to see a record 60 gigawatts (GW) of new clean power capacity come online (the equivalent of 29 Hoover Dams), nearly double the 2023 total of new clean power capacity
- In the first nine months of 2025, 9.4 GW of planned clean power capacity was canceled, with nearly 15 percent of planned offshore wind capacity canceled.
- Texas has nearly twice the clean power capacity (planned, under construction, and operational) of California, the state with the second-highest capacity. Most of Texas' clean capacity comes from solar photovoltaic (66 GW), onshore wind (48 GW) and batteries (40 GW).
- Solar and batteries dominate planned clean capacity (85 percent of all planned clean power capacity) through 2031.
- Current clean power capacity is overwhelmingly in Republican districts. Of the top 25 districts with the highest clean energy capacity, only three are represented by Democrats. Likewise, 79 percent of canceled clean energy capacity in 2025 has been in Republican districts.
- Planned and under construction solar capacity has twice the average output as planned and under construction natural gas (i.e. considering capacity factor).

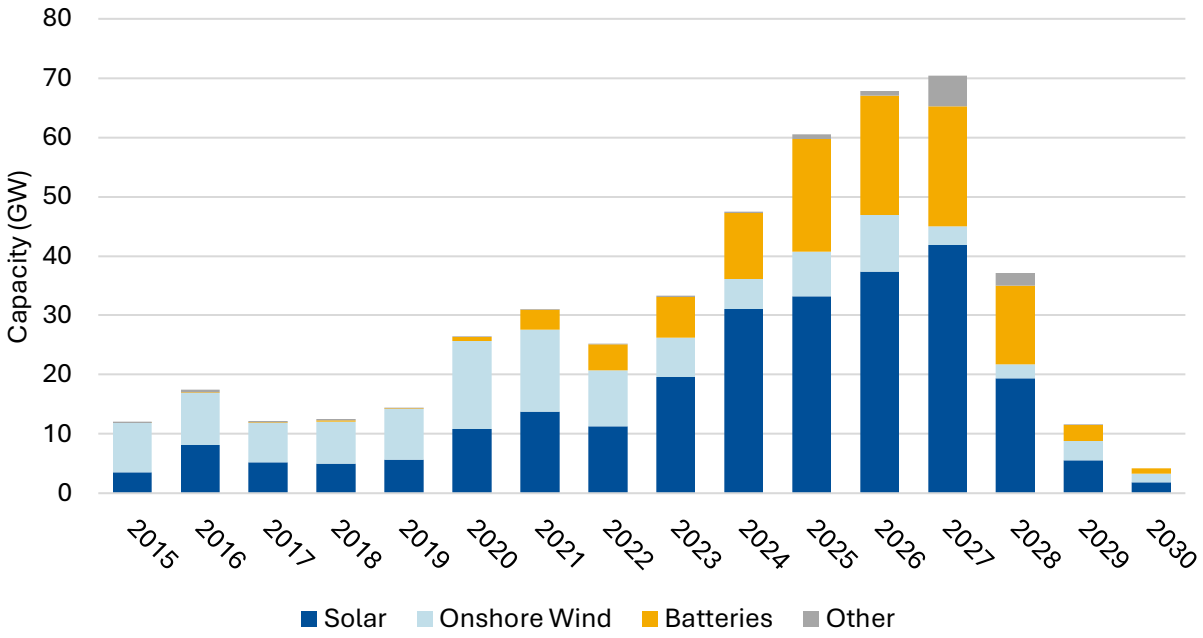
Introduction

The United States is the world's second-largest electricity consumer, after China. To serve growing energy consumption, the power sector faces significant challenges moving forward including how to provide power affordably, cleanly, and reliably. Electricity rate increases are putting more financial strain on households. Lawrence Berkeley National Laboratory analysis released in October 2025 indicates that electricity price increases are not consistent across the country and that the three largest drivers of cost from 2019 to 2024 have been replacement and hardening of aging distribution and transmission, natural gas price variability, and extreme weather and wildfires.

Clean power is key to meeting growing power demand. This brief provides an overview of clean power capacity as of Q3 2025. Clean power in this brief refers to batteries, geothermal, hydroelectric (both conventional and pumped storage), onshore wind, offshore wind, and solar (photovoltaic and thermal) but does not include nuclear generation or biomass. The data herein refers to clean power capacity (i.e. clean generation as well as battery storage capacity). Capacity

figures refer to nameplate capacity and therefore do not account for actual output or utilization of these facilities, unless otherwise noted (known as capacity factor). Capacity factor varies by technology. Planned refers to projects announced and under construction. This brief complements analysis on the state of manufacturing in Q3, released in November 2025 and monthly snapshots on the state of manufacturing from August, October, and November 2025.

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



Includes capacity that is operational, under construction, or planned. Year refers to when capacity came online or is expected to come online. Data covers projects beginning in 2015 through 2030. Planned capacity in future years will increase over time as new, further out projects qualify for this database, as EIA requires that a project has "(1) all environmental and regulatory approvals, (2) a signed contract for the electric energy, or (3) financial closure for the facility." "Solar" includes thermal projects and solar photovoltaic. "Other" includes offshore wind, geothermal, and hydroelectric predominantly.

Source: Clean Economy Tracker

Clean Capacity through Q3 2025

New clean power capacity in the United States continues to rise rapidly. In 2025, the United States is expected to see a record 60 gigawatts (GW) of capacity of new clean power come online (the

equivalent of 29 Hoover Dams)[1] (Figure 1), nearly double the clean capacity brought online in 2023. Power demand and electricity rates are expected to rise over the coming years, creating a greater demand for affordable electricity. The growth comes amidst growing hostility from the Trump Administration toward clean energy, including Department of Interior restrictions, cancellations of large projects, Congressional cutting and revision of certain generation tax credits and Department of Energy cuts to grant programs to support clean energy deployment.

Table 1: Nameplate and Average Output for Planned Projects as of Q3 2025

Technology	Nameplate Capacity (GW)	Average Capacity Factor for 2025	Average Output (GW)
Solar Photovoltaic	121.6	27%	**32.8**
Onshore Wind Turbine	24.5	46%	**11.3**
Offshore Wind Turbine	5.9	46%	**2.7**
Natural Gas – Combined Cycle	26.4	61%	**16.1**
Natural Gas – Other	14.1	20%	**2.8**

Planned capacity includes capacity in pre-construction phase and under construction. Capacity refers to nameplate capacity. Capacity factor refers to 2025 from NREL'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 Q3 2025 adds up to 664 GW, of which a third (222 GW) is planned or under construction. In comparison, net power capacity from fossil fuels (natural gas, coal, and petroleum liquids) announced through Q3 2025 is roughly 838 GW. Looking only at planned capacity, there is 222 GW of planned and under construction clean capacity compared with 41 GW of planned and under construction fossil fuel capacity (there is also less than 1 GW of other planned capacity, principally nuclear and biomass). In total, developers will invest an estimated $384 billion in planned and under construction clean power capacity through 2031. In comparing technologies and power capacity, it is important to consider capacity factor. Per NREL estimates for 2025, capacity factor for utility scale technologies (i.e. not including residential solar) range from 27 percent for utility scale solar to 93 percent for nuclear generation. In Table 1, leading technologies are multiplied by a capacity factor to produce

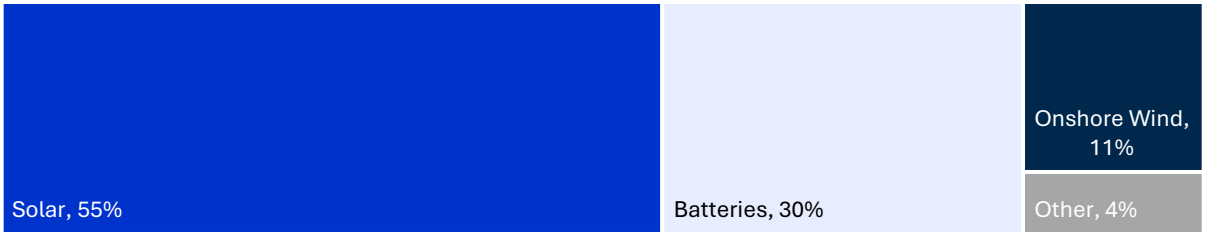
[1] The capacity of the Hoover Dam is approximately 2.1 GW.

average output. Clean technologies have a lower capacity factor but remain the majority of planned and under construction capacity. Planned and under construction solar capacity has twice the average output as planned natural gas (i.e. considering capacity factor).

Solar and Batteries Dominate Planned Clean Capacity

Looking only at planned, not-yet-operational clean 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 2).[2] These planned projects represent significant economic opportunity. Planned solar investments will lead to an estimated $179 billion in investment and batteries an estimated $115 billion. Both solar and batteries are seeing unprecedented levels of growth from relatively small baselines in the United States. There is more planned battery capacity than current operating battery capacity (67 GW planned capacity compared with 37 GW in operating capacity as of Q3 2025). There remains limited geothermal and hydro planned capacity.

Figure 2: Planned Clean Power Capacity by Technology as of Q3 2025 (GW)



Planned includes announced facilities, both under construction and not yet under construction. “Other” includes offshore wind and hydroelectric, predominantly.

Source: Clean Economy Tracker

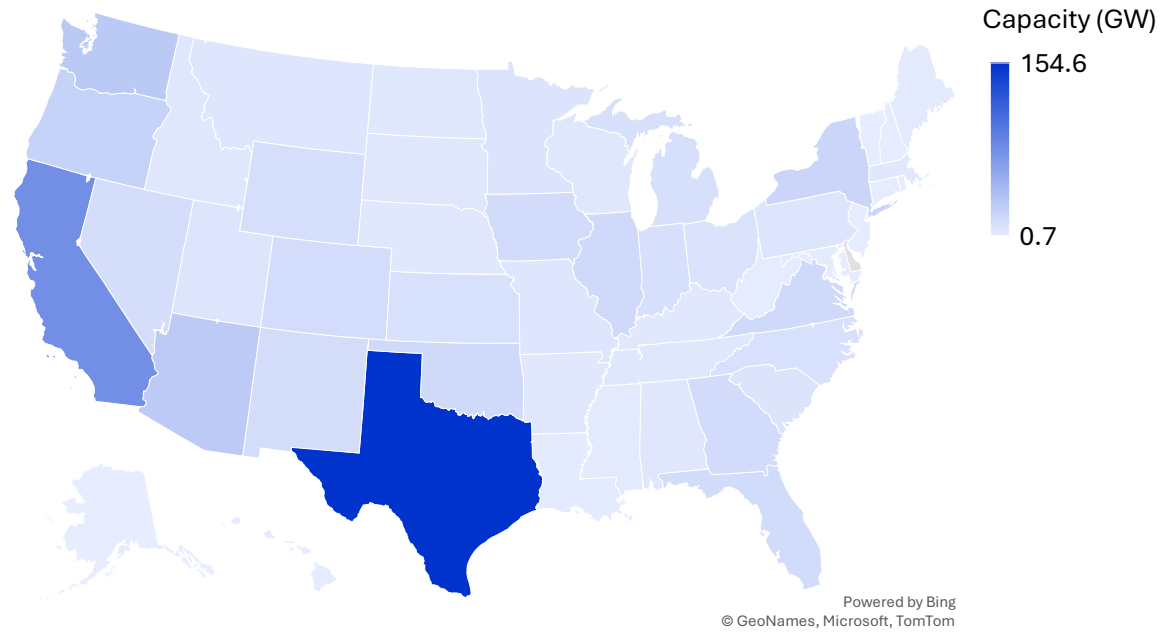
Texas Continues to Lead All States in Clean Capacity

As of Q3 2025, Texas continues to lead all states for clean power capacity (planned, under construction, and operational), per Figure 3. Texas has nearly double the capacity of the next state, California. Texas leads the country in power capacity for solar photovoltaic (66 GW), onshore wind (48 GW), and batteries (40 GW). Likewise, three of the top five clean power capacity districts in the

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

country are in Texas. TX-19 leads all districts in clean energy capacity (27 GW), with a significant portion of the capacity already operational.

Figure 3: States with the Most Clean Power Capacity through Q3 2025

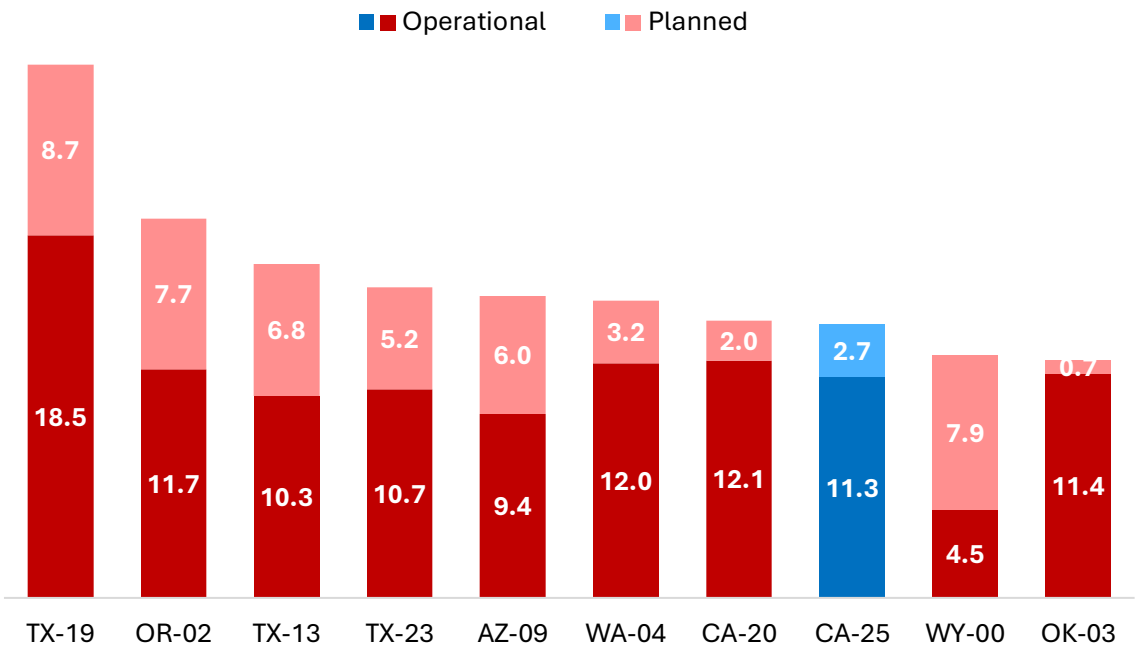


Map shows the total clean capacity by state (planned, under construction, and operational). The darker the shade of blue, the larger the power capacity. “Capacity” refers to nameplate capacity.

Source: Clean Economy Tracker

Clean energy capacity is overwhelming in Republican represented districts nationwide — 79 percent of all clean power capacity is in Republican-represented House districts (per Figure 4). In fact, of the top 25 districts with the highest clean energy capacity, only three are represented by Democrats: CA-25, TX-28, and NM-01. Aside from TX-19, WY-at large and OR-02 have more planned clean energy capacity than any other district. CA-25 is the only Democratic-represented district in the U.S. with clean power capacity over 10 GW.

Figure 4: Clean Power Capacity by Congressional District through Q3 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 Unknown districts, which principally house offshore wind. There is 6 GW of offshore wind capacity in the United States, almost all of which is planned or under construction.

Source: Clean Economy Tracker

Wind Projects Face the Biggest Headwinds

In total, 9.4 GW of previously planned clean power capacity has been canceled in 2025 to date (Table 2). Cancellations are not unusual for power projects, however, higher proportions of project cancellations may point to challenges for certain industries. Wind projects, and particularly offshore wind projects, have struggled the most in 2025 through Q3, relative to the total planned capacity. While onshore wind faced 1.7 GW (6.5 percent of total planned capacity) in capacity cancellations, offshore wind faced 1 GW (14.5 percent). Likewise, battery projects have seen significant cancellations in 2025 at 3.7 GW of capacity (5.3 percent). Solar and natural gas projects have seen few cancellations relative to total planned capacity at 3 GW (2.4 percent) and 1.5 GW (3.6 percent), respectively.

Table 2: Planned Capacity and Capacity Cancellations in 2025 through Q3 2025

Technology	Total Planned Capacity (GW)	Cancellations in 2025 (GW)	Proportion of Canceled Projects (GW of cancellations)
Solar	121.8	3	2.4%
Batteries	66.6	3.7	5.3%
Natural Gas	40.5	1.5	3.6%
Onshore Wind Turbine	24.5	1.7	6.5%
Offshore Wind Turbine	5.9	1.0	14.5%

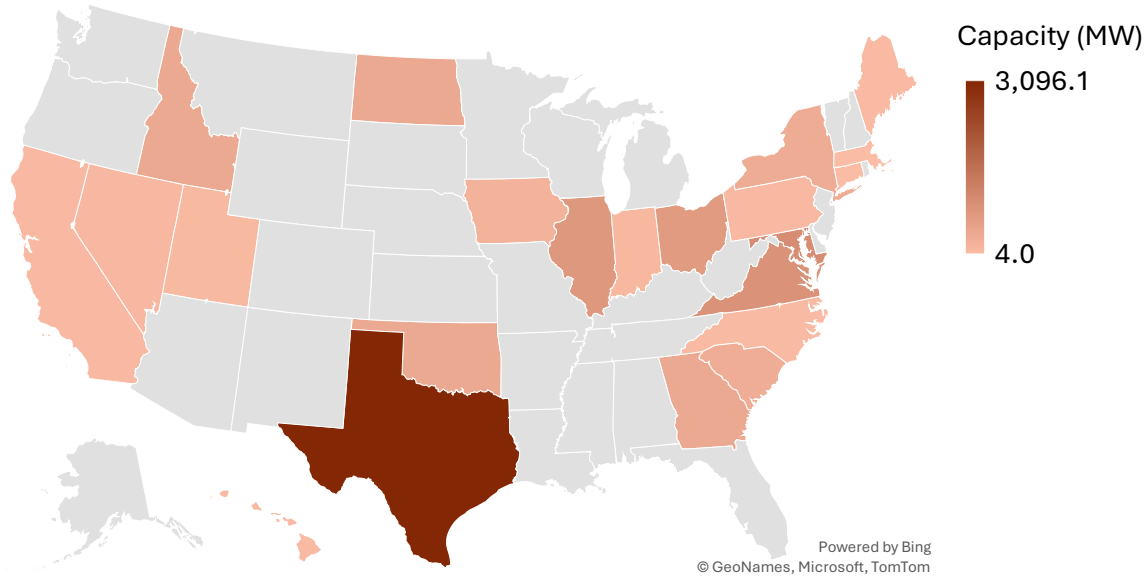
Cancellations from January 2025 through September 2025. “Planned” includes projects under construction and as of September 2025. “Cancellations” do not include retired projects. “Natural gas” is included as a point of comparison and includes the following technologies: natural gas fired combined cycle,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

Source: Clean Economy Tracker

States Hit Hardest by Investment Cancellations

With more planned new clean power capacity than any other state, Texas also leads the nation in project cancellations, see Figure 5. In 2025 through Q3, the state has seen more than 3 GW of canceled clean power capacity, mostly canceled battery capacity. However, this amounts to less than five percent of all planned clean capacity in Texas. Maryland and Virginia are next with a combined 1.8 GW in cancellations, due in large part to offshore wind cancellations in Maryland and solar cancellations in Virginia. Maryland, North Dakota, and Idaho experienced the largest proportions of canceled clean capacity in 2025 as a percentage of planned clean capacity.

Figure 5: Announced Power Capacity Cancellations by State in 2025 through Q3 2025

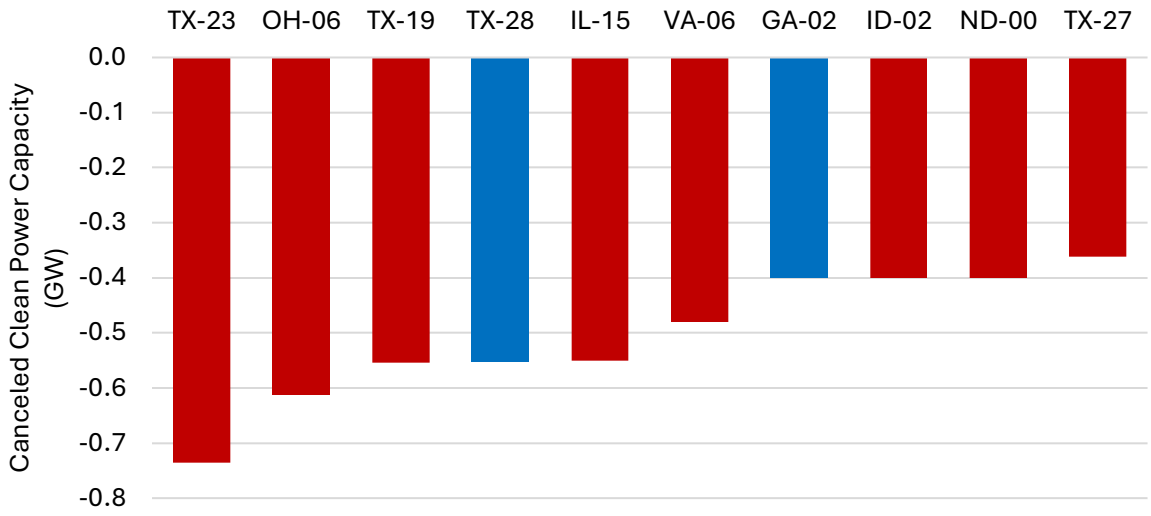


The darker the shade of brown, the greater the level of cancellations, in MW. States with gray fill have no publicly announced cancellations. “Capacity” refers to nameplate capacity.

Source: Clean Economy Tracker

As seen in Figure 6, TX-23 has seen more cancellations in 2025 than any other district. The southwestern Texas district, stretching from western San Antonio to El Paso, saw mostly canceled battery projects worth an estimated $1.3 billion in investment.

Figure 6: Largest Clean Power Capacity Cancellations by Congressional District in 2025 through Q3 2025



Red refers to a Republican represented House Congressional District and blue refers to Democratic. Congressional districts are based on the 119th Congress. Does not include projects in Unknown districts (principally 3.3 GW of offshore wind in New Jersey and Maryland).

Source: Clean Economy Tracker

Conclusion and Looking Ahead

The third quarter of 2025 marks a pivotal moment for clean power in the United States with unprecedented growth in new clean power capacity. New capacity is dominated by two technologies (solar and battery) and one state (Texas). Despite this momentum, the clean power sector faces notable challenges, including policy headwinds and significant project cancellations, particularly in wind and battery segments. These trends underscore both the resilience and vulnerability of the clean energy transition, 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 December 3, 2025. Technology includes batteries, geothermal, hydroelectric (including conventional hydropower and hydroelectric pumped

storage), onshore Wind, offshore wind, solar photovoltaic (PV), and solar thermal. According to the U.S. Energy Information Administration, nameplate capacity refers to the maximum rated output of a generator designated by the manufacturer, expressed in gigawatts (GW). Operational includes currently operating, standby/backup, and temporarily out of service facilities. Planned refers to announced and under construction facilities. Cancellations does not include retired projects.

The data are from the U.S. Energy Information Administration (EIA) Annual Electric Generator Report (Form EIA-860), for the years that are available. Where annual data are not yet available, the data are pulled from the EIA Preliminary Monthly Electric Generator Inventory (Form EIA-860M) (there is a delay of approximately 6 months between the end of the year and when the data becomes available) which are considered preliminary estimates (i.e., projects reported in one month could be removed or corrected in subsequent releases). 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 1 megawatt (MW) or larger. The first 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.

Acknowledgment

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.