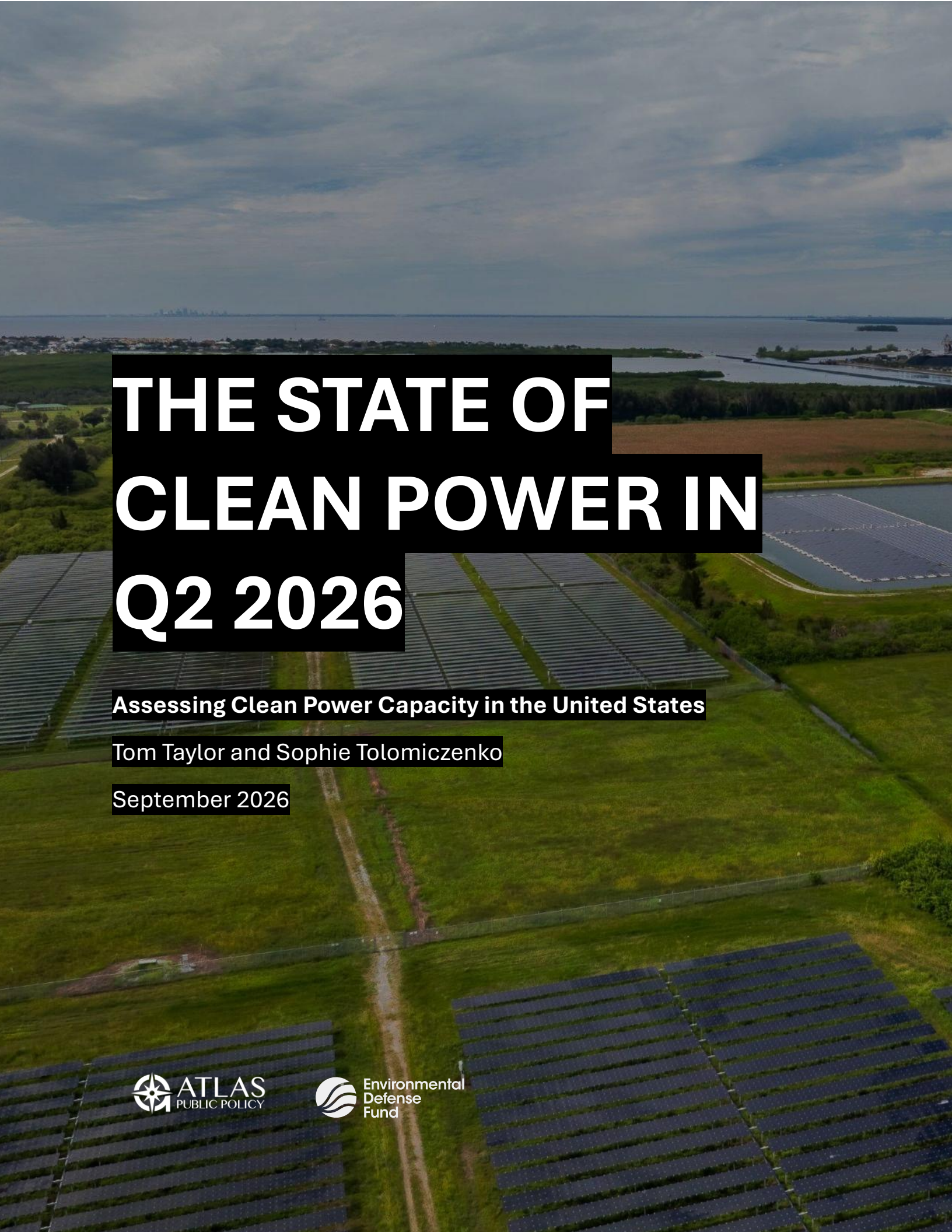

# THE STATE OF CLEAN POWER IN Q2 2026

**Assessing Clean Power Capacity in the United States**

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September 2026

ATLAS PUBLIC POLICY

Environmental Defense Fund

# Contents



# Key Takeaways

- Clean power capacity continued to grow through Q2 2026, with 17.8 GW of clean capacity coming online in Q2, reaching 489.6 GW operational in the United States. There is another 211.7 GW in planned and under construction capacity through 2031.
- Solar and batteries dominate the near-term clean power pipeline, accounting for roughly 87 percent of planned and under construction clean capacity and an estimated $281 billion in future investment.
- Solar is poised to overtake wind as the source of most operational clean power capacity.
- Clean power project cancellations increased in the first half of 2026 to 14.9 GW, with batteries representing the highest proportion of canceled projects, followed by solar. More clean capacity was canceled in the first half of 2026 than in all of 2025 (13.1 GW).
- Canceled clean power projects represent an estimated loss of $24.5 billion in investment and 68,300 construction jobs in the first half of 2026 alone.
- Natural gas development rose sharply in Q2 2026, with planned and under construction capacity increasing by 23.5 GW in the first half of 2026 (see Table 1). By the end of Q2, fossil fuels accounted for 29 percent of planned capacity, the most since 2019.

# 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. Meeting that demand will require new generation, storage, transmission, and demand-side resources to achieve affordability and reliability goals. Clean power is expected, and well positioned, to play a central role in meeting this growing demand. The International Energy Agency's (IEA) Mid-Year 2026 Electricity Update notes that U.S. electricity consumption is forecast to rise by nearly two percent in 2026, driven by data centers, air conditioning, and industrial demand. IEA's Mid-Year Update also found that continued growth in renewable electricity generation helped diversify power supplies and mitigate the impacts of recent fuel market disruptions, underscoring the role of clean technologies in supporting energy security during periods of geopolitical uncertainty. This brief provides an overview of clean power capacity through the second quarter of 2026 and complements previous analyses on the state of clean power and clean energy manufacturing.[1]

Table 1: Changes in Planned and Under Construction Capacity in Q2 2026

| Technology | Planned & Under Construction Capacity as of June 2026 (GW) | Net Change since Q1 2026 (GW) | Change since Q1 2025 (GW) |
|---|---|---|---|
| **Solar** | 122.2 | -1.1 | +5.4 |
| **Batteries** | 62.2 | -2.9 | -3.7 |
| **Wind** | 24.1 | No change | -0.9 |
| **Natural Gas** | 68.3 | +2.8 | +27.8 |

[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.

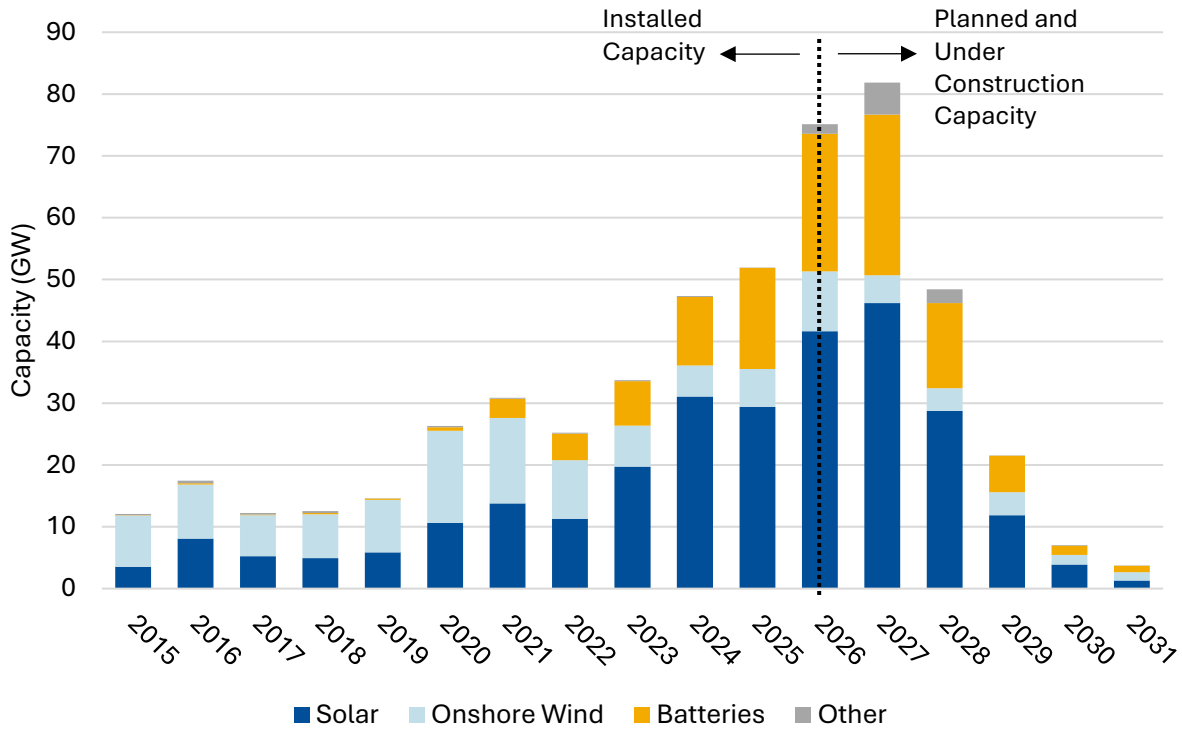
"Natural gas" includes the following technologies: natural gas fired combined cycle, natural gas fired combustion turbine, natural gas internal combustion engine, natural gas steam turbine, and other natural gas. "Wind" includes onshore and offshore wind. "Solar" includes photovoltaic and thermal. This figure only includes technologies with more than five GW of planned and under construction capacity. Planned and under construction capacity includes all forward projects reported to the EIA. All projects that will be "primarily fueled by energy sources other than coal or nuclear energy expected to begin commercial operation within five years" are included in the data, for coal and nuclear projects, it includes all projects expected to begin operation within 10 years.

Source: Clean Economy Tracker, Energy Information Administration

# Clean Power Capacity through Q2 2026

There are 489.6 gigawatts (GW) of operational clean power capacity in the United States as of the second quarter of 2026. In the first half of 2026, 26 GW of new clean power (nameplate capacity) came online domestically (Figure 1). Of the 26 GW that came online through the end of June 2026, 11.5 GW came from solar, 8.3 GW from batteries, and 6.3 GW from wind. The new solar and wind capacity added in the first half of 2026 could generate enough electricity annually to power 5 million U.S. homes. An additional 211.7 GW in capacity is currently planned and under construction to come online between July 2026 and December 2031. At 122.2 GW, solar makes up nearly 58 percent of planned and under construction clean capacity, with batteries following at 62 GW or 29 percent. Wind represents the bulk of remaining clean power planned and under construction capacity at 24.1 GW or 11 percent.

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 June 2026.

Source: Clean Economy Tracker, Energy Information Administration

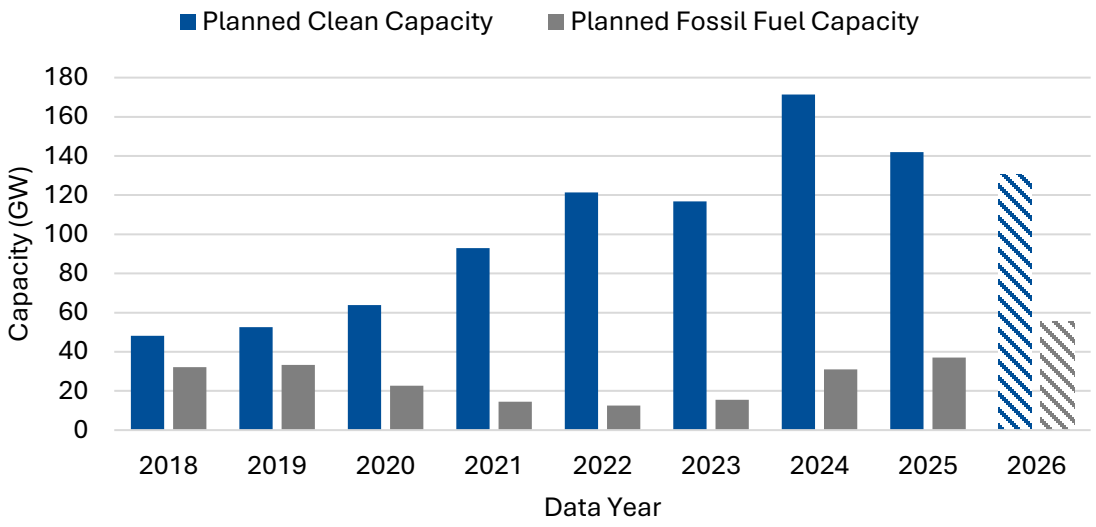
Total planned capacity[2] for clean power rose from 2018 to 2024, reaching 171 GW in 2024 (Figure 2).[3] Since 2025, however, planned clean capacity has dropped to 131 GW through June 2026, noting that data is only available through Q2 2026 and a full comparison across years requires data through the end of the year. As planned clean power is dropping relative to recent years, planned fossil capacity is rising from its 2022 low. As of Q2 2026, planned fossil capacity is 55 GW, the highest level since at least 2016. By the end of Q2 2026, fossil fuel generation sources accounted for 29 percent of planned capacity, compared to just nine percent of planned capacity at the end of 2022, a threefold increase. Not all planned capacity ultimately reaches completion, however. Projects can be delayed, scaled back, or canceled because of financing challenges, construction delays, policy or regulatory changes, and other factors that affect timelines or expected generation

[2] Total planned capacity refers to the cumulative capacity reported to EIA as planned and under construction as of the end of the data year shown, regardless of the year the project is expected to come online. It is not the capacity announced in, or coming online in, that year.

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

capacity. The discussion of project cancellations in the *Texas Leads Both New Power and Cancellations in 2026* section below shows how these shifts can appear in the data.

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

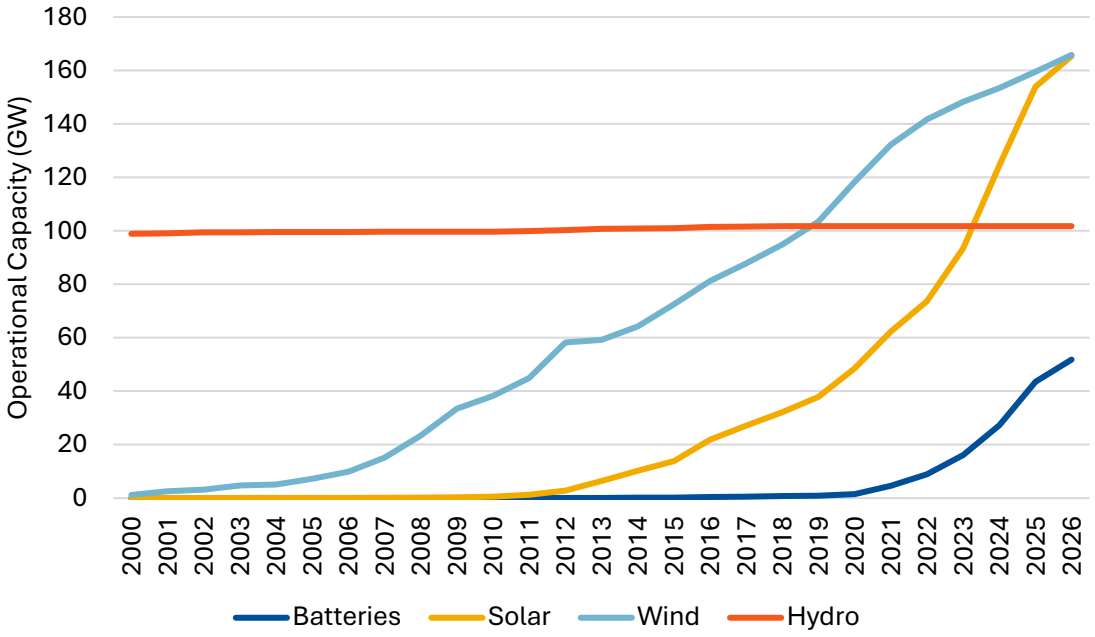



Data year refers to the total future planned capacity as of December each year, except for 2026, which reflects data through June. Does not include operational or under construction capacity.

Source: Clean Economy Tracker, Energy Information Administration

In 2019, wind overtook hydroelectric power to become the largest source of clean power in the United States. Solar is now poised to overtake wind as the source of most operational clean power capacity in the United States. Figure 3 shows solar's rapid rise alongside the fast growth of battery storage. Batteries have expanded from a much smaller base, growing from less than one GW of installed capacity in 2019 to 51.6 GW as of Q2 2026. The data also points to the slowdown in new wind capacity. Clean power growth is increasingly concentrated in solar and batteries, even as wind remains a major part of the existing clean power fleet.

Figure 3: Solar Capacity is Poised to Overtake Wind, Battery Rises Fast for Operational Capacity, Hydro Unchanged




Refers to cumulative operational capacity (GW) for the four largest sources of clean power as of 2026.

Source: Clean Economy Tracker, Energy Information Administration

With power demand and electricity rates both expected to rise in coming years, policymakers face increasing pressure to add generation and transmission in a way that results in affordable and reliable electricity. This growth comes amid federal actions that continue to hinder clean power development, including Department of the Interior permitting changes, project cancellations and delays, and Congressional actions to scale back or revise tax credits for clean power generation and production. Federal actions have also included the attempted cancellation or rescission of direct funding awards for clean energy projects, compounding the effect of the tax credit phaseouts on project economics. Among these was the One Big Beautiful Bill Act (OBBBA), enacted on July 4, 2025, which accelerated the phaseout of the clean electricity production and investment tax credits (Sections 45Y and 48E)[4] for wind and solar. Under the law, projects must have begun construction on or before July 4, 2026, or be placed in service before the end of 2027, to preserve eligibility.

Permitting delays have compounded this uncertainty. In Q1 2026, reports emerged of delayed federal approvals for clean power projects on both federal and private land, reflecting the impacts

[4] I.R.C. §§ 45Y, Clean Electricity Production Credit, and 48E, Clean Electricity Investment Credit

of a raft of federal government review requirements and restrictions. By Q2 2026, a Wood Mackenzie report estimated that stalled federal permits placed more than $121 billion in wind and solar investment at risk, with roughly 32 percent of the early-stage renewable pipeline subject to heightened federal scrutiny. In April 2026, the U.S. District Court for the District of Massachusetts, in *Renew Northeast v. United States Department of Interior*, issued a preliminary injunction blocking the administration from enforcing five federal agency actions imposing sweeping restrictions on federal permitting for wind and solar energy projects. The ruling may allow substantial stalled renewable capacity to resume the federal permitting process.

Broader market conditions have added further complexity to the clean power landscape, though the impacts on domestic clean power production remain unclear. Energy supply bottlenecks stemming from the war with Iran have led to fluctuations in fuel costs around the world, but the U.S. natural gas market has remained relatively insulated. U.S. gas price trends have varied across sectors, with residential prices increasing while commercial, industrial, and electric power prices have remained stable or declined. U.S. natural gas prices could rise if persistent global supply constraints make export markets more attractive, reducing natural gas's competitiveness in the electricity market. Meanwhile, the Trump administration has focused on extending the life of coal plants[5] and increasing oil and natural gas production, though the significance of these actions remains to be seen.

Meeting the increased demand will require adequate transmission capacity to connect new resources and deliver electricity across regions. In August 2026, the U.S. Department of Energy discontinued three proposed National Interest Electric Transmission Corridors in areas previously identified as experiencing higher electricity prices or more frequent outages because of insufficient transmission infrastructure. The government cited public feedback and indicated it would recalibrate the corridor program to better reflect local priorities while continuing to support other transmission projects.

# Solar and Batteries Dominate Planned Clean Capacity

Looking only at planned and under construction capacity, solar and batteries lead all other clean technologies with 58 and 29 percent, respectively (Figure 4).[6] These projects represent significant economic opportunity: planned and under construction solar projects will result in an estimated $176.2 billion in investment, and batteries an estimated $104.8 billion. Battery storage technology in the United States is seeing unprecedented levels of growth from a small baseline. Planned and

[5] U.S. Department of Energy announced in February 2026 that there was 17 GW of coal generation prevented from closure.

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

under construction battery capacity expected to come online in the next five years already exceeds today's operational battery capacity, with 62 GW of planned and under construction capacity compared to 51.6 GW online as of Q2 2026. Planned and under construction onshore wind capacity, however, sits at 19 GW compared to 165.8 GW online as of the end of Q2 2026, pointing to limited growth. For solar, there is large planned and under construction capacity, 122.2 GW, but also existing operational capacity online, 165.6 GW. By contrast, planned and under construction geothermal and hydroelectric capacity remain modest, totaling just over three GW.

Figure 4: Planned and Under Construction Clean Power Capacity by Technology, Q2 2026


"Other" includes offshore wind and hydroelectric, predominantly.

Source: Clean Economy Tracker, Energy Information Administration

# Effective Capacity Narrows the Clean and Fossil Capacity Gap

Clean power capacity (planned, under construction, and operational) announced through Q2 2026 totals 701.3 GW, including 17.8 GW of operational capacity added in Q2 2026. About 31 percent or 211.7 GW is planned and under construction. Energy developers plan to invest an estimated $355.9 billion in clean power capacity through 2031 for planned and under construction capacity.[7] By comparison, planned, under construction and operational fossil fuel capacity (natural gas, coal, and petroleum liquids) over the same period is about 848 GW, with 68 GW of fossil fuel capacity currently planned and under construction, almost all of which is natural gas.[8] By the end of Q2, fossil fuels accounted for 29 percent of planned capacity, the most since 2019.

Table 2 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 effective

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

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

capacity—the mean amount of energy generated over a typical year.[9] Clean technologies typically have a lower capacity factor but remain the majority of planned and under construction capacity based on effective capacity. Planned and under construction solar capacity has similar expected effective capacity as natural gas.

Table 2: Nameplate Capacity and Effective Capacity for Planned Projects and Projects Under Construction Through Q2 2026

| Technology | Nameplate Capacity (GW) | Average Capacity Factor | Effective Capacity (GW) |
|---|---|---|---|
| **Solar Photovoltaic** | 122.2 | 26.9% | 32.9 |
| **Onshore Wind Turbine** | 19.0 | 46.2% | 8.8 |
| **Offshore Wind Turbine** | 5.1 | 46.6% | 2.4 |
| **Hydroelectric** | 3.0 | 33.0% | 1.0 |
| **Natural Gas – Combined Cycle** | 47.2 | 58.4% | 27.6 |
| **Natural Gas – Other** | 21.2 | 19.8% | 4.2 |

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 estimates as the most recent annual data. "Natural Gas – Other" includes 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, Energy Information Administration

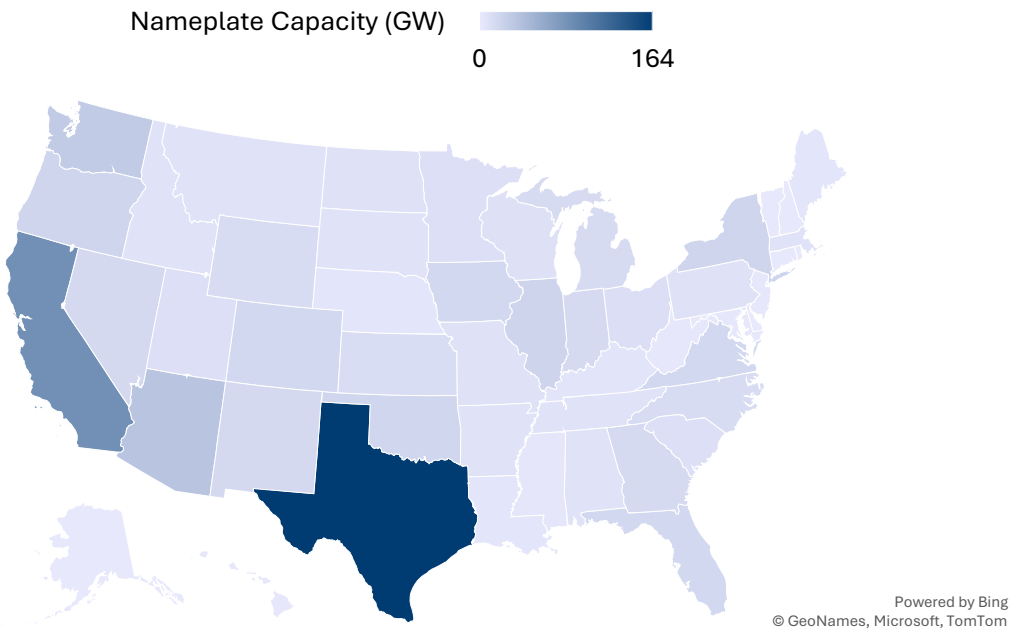
# Texas Continues to Lead All States in Clean Capacity

As of the end of Q2 2026, Texas has more planned, under construction, and operational clean power capacity than any other state (Figure 5). With 165 GW, Texas has nearly twice as much clean power capacity as the second-ranked state, California, at 84 GW. Texas leads the country in power capacity for solar photovoltaic (72.4 GW), onshore wind (49.1 GW), and batteries (42.1 GW). Three

[9] 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.

of the country's five congressional districts with the most clean power capacity are in Texas (Figure 6), led by TX-19 with 30 GW of capacity, about two-thirds of which is already online. Washington state leads the country in hydroelectric capacity (21 GW) and California in geothermal (2.7 GW).

Figure 5: States' Total Clean Power Capacity through Q2 2026 (GW)

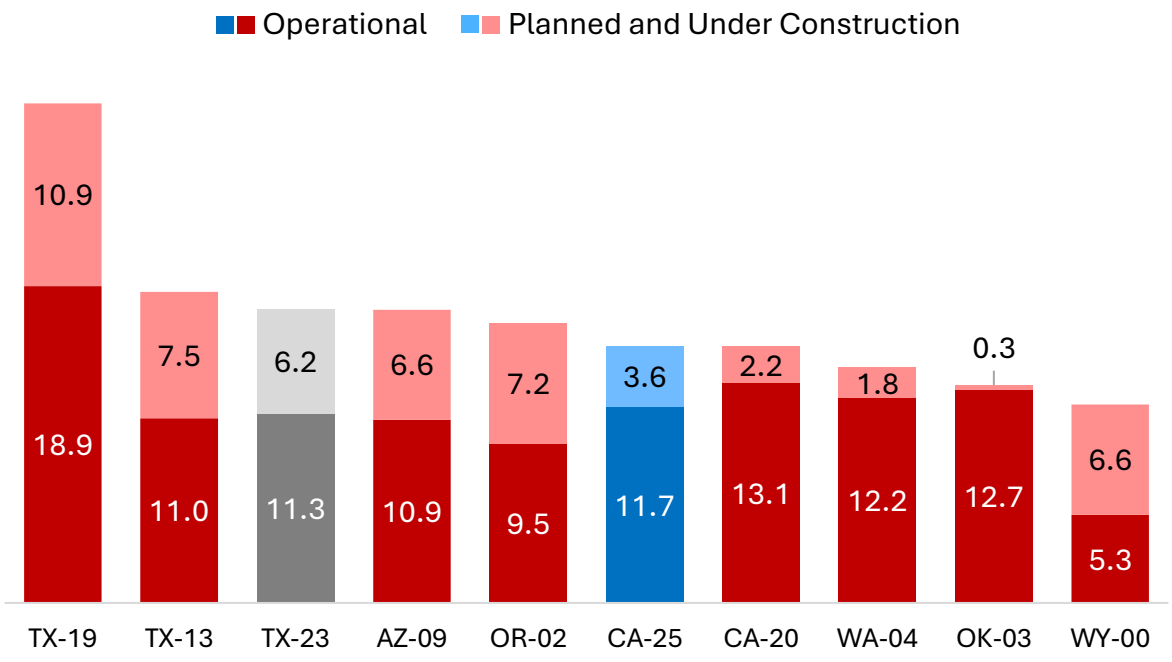



The map above shows the total clean capacity by state (planned, under construction, and operational). The darker the shade of blue, the larger the power capacity. "Capacity" refers to nameplate capacity.

Source: Clean Economy Tracker, Energy Information Administration

Across the United States, 76 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 four are represented by Democrats: CA-25, CA-13, TX-28, and NM-01. CA-25 is the only Democratic-represented district with clean power capacity over 10 GW (Figure 6).

Figure 6: Congressional Districts with the Highest Clean Power Capacity through Q2 2026 (GW)




Red refers to a Republican represented House congressional district and blue refers to a Democratic represented District. Gray indicates that the seat is vacant as of August 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, Energy Information Administration

# Clean Power Cancellations and Wind Development Headwinds

In the first half of 2026, energy developers canceled 14.9 GW of previously planned and under construction clean power capacity (Table 3), including 6.9 GW in Q2 2026. More clean power capacity was canceled in the first half of 2026 than in all of 2025 (13.1 GW). Solar and battery projects accounted for almost all canceled clean capacity. Canceled solar capacity in Q1 and Q2 represented only 6.1 percent of total planned and under construction solar projects, while battery cancellations were more significant and represented 11.9 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, energy

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 68.3 GW by the end of Q2 2026, an increase of 23.5 GW.

Table 3: Planned and Under Construction Capacity Compared to Cancellations in Q1 and Q2 2026

| Technology | Total Planned & Under Construction Capacity as of June 2026 (GW) | Capacity Canceled in 2026 (GW) | Share of Planned Capacity Canceled |
|---|---|---|---|
| **Solar** | 122.2 | -7.4 | 6.1% |
| **Batteries** | 62.2 | -7.4 | 11.9% |
| **Wind** | 24.1 | -0.1 | 0.4% |
| **Natural Gas** | 68.3 | -0.3 | 0.4% |

This table shows only technologies with cancellations greater than 100 MW recorded in Q1 and Q2 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. Change in the planned and under construction capacity reflects changes in data as reported to EIA.

Source: Clean Economy Tracker, Energy Information Administration

Wind projects face sustained federal headwinds through the first half of 2026. Over the past year, the Trump administration offered payments to energy developers to relinquish offshore wind leases, including multiple projects in Q2. The administration also added new review requirements for wind permitting, while the accelerated tax credit phaseout narrowed the window for project eligibility. 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, 11.2 GW of capacity is planned to come online, of which 3.7 GW is slated to begin generation in New Mexico, continuing the geographic concentration of onshore wind on the Great Plains. Prospects for growth are complicated by a U.S. Department of Defense action in May 2026 to halt a review of more than 150 onshore wind projects.[10] The 30 GW of capacity contained in those projects is effectively stalled without Pentagon approval. In July 2026, 19 states and the District of Columbia moved to intervene

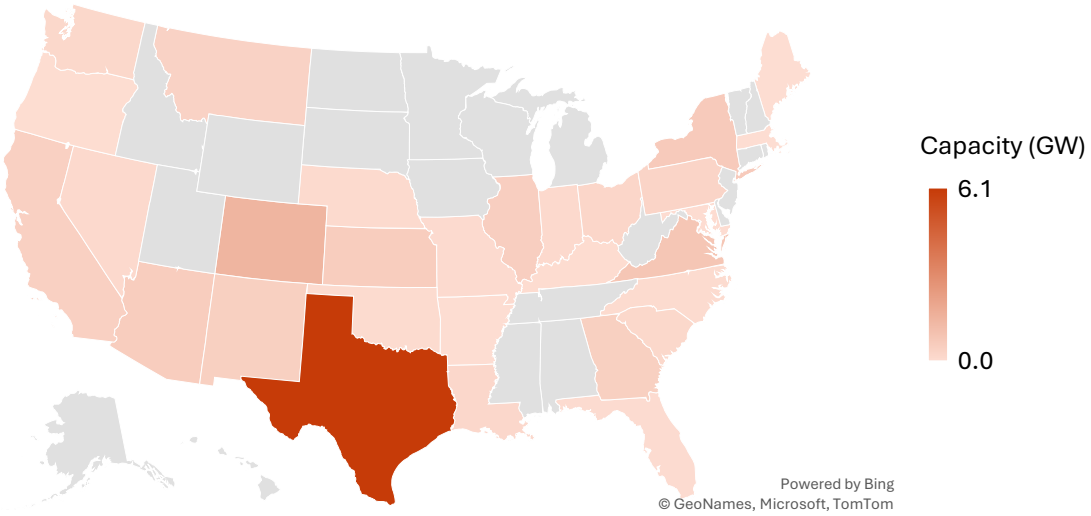
[10] The Pentagon requires review of such projects to ensure installed turbines will not warp military radars or require changes in flight paths.

in *Renewable Northwest et al. vs. U.S. Department of Defense* in the U.S. District Court for the District of Oregon, seeking to vacate the freeze on the grounds that it drives up electricity costs, threatens grid capacity, and impedes state emissions reduction efforts. The plaintiffs argue the action bypasses the timely, project-by-project review process Congress established for balancing wind development against national security concerns. In August 2026, a federal judge issued a preliminary injunction ordering the Department of Defense to "resume the review process while the case proceeds."

# Texas Leads Both New Power and Cancellations in 2026

Alongside more planned, under construction, and operational capacity than any other state, Texas continues to lead the nation in project cancellations (Figure 7). In the first half of the year, the state saw about 6.1 GW of canceled clean power capacity. In all of 2025, Texas recorded 5.4 GW of cancellations. The canceled projects in Texas amounted to an estimated $10.1 billion in investment and would have created an estimated 29,600 construction and operations jobs. Cancellations in the first half of 2026 amount to approximately nine percent of all planned and under construction clean power capacity in Texas, higher than the national total of just over seven percent.

Figure 7: Announced Clean Power Capacity Cancellations by State in Q1 and Q2 2026

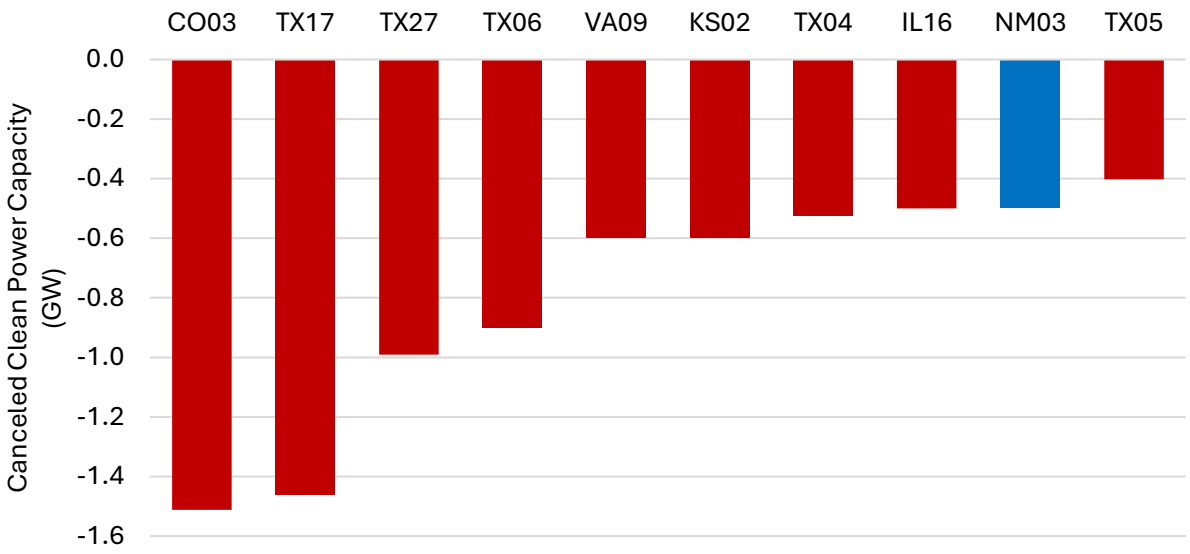



The darker the shade of red, the greater the level of cancellations in GW. States with gray fill have no publicly announced cancellations. "Capacity" refers to nameplate capacity.

Source: Clean Economy Tracker, Energy Information Administration

Colorado has also experienced significant clean power project cancellations in 2026. Over 1.5 GW was canceled, all of which stemmed from canceled solar and battery capacity. These cancellations represent 38 percent of all planned and under construction clean capacity in the state. As seen in Figure 8, CO-03 has seen more cancellations in 2026 than any other district, with a mix of solar and battery storage projects canceled. TX-17 followed with 1.5 GW of canceled battery and solar projects in 2026. The canceled projects were poised to bring an estimated $2.4 billion in investment and more than 7,100 construction jobs to the district. More broadly, canceled clean power projects nationwide would have created an estimated 68,300 construction jobs and represented an estimated $24.5 billion in investment.

Figure 8: Largest Clean Power Capacity Cancellations by Congressional District in Q1 and Q2 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, Energy Information Administration

# Clean Power Growth Continues Amid an Uncertain Outlook

Clean power capacity continued to expand through Q2 2026, with 489.6 GW operational and an additional 211.7 GW planned and under construction through 2031. Solar and battery storage account for approximately 87 percent (58 and 29 percent, respectively) of planned and under construction clean capacity, indicating that near-term growth remains concentrated in these technologies. Onshore wind retained its substantial operational capacity; however, its development pipeline (planned and under construction capacity) remains limited. At the same time, fossil fuel capacity accounted for 29 percent of planned capacity at the end of Q2 2026, reflecting increased development of natural gas.

The outlook for planned clean power remains subject to policy, permitting, financing, and market conditions. In the first half of 2026, canceled clean power projects represented an estimated $24.5 billion investment and 68,300 construction jobs, demonstrating the potential economic implications of clean power projects that do not proceed. Clean power will be critical to meet projected electricity demand, particularly where projects can interconnect quickly and complement dispatchable resources, storage, transmission, and demand-side measures. Future deployment will depend on whether projects can advance through federal review, interconnection, financing, and construction as tax-credit eligibility narrows and demand for new generation continues to increase.

# Methodology

This brief draws on Atlas Public Policy analysis using Clean Economy Tracker data derived from U.S. EIA Form EIA-860 and EIA-860M Data. Data was pulled on August 11, 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 and under construction. Cancellations do not include retired projects. Comparisons over time are based on the data available at the time of this report, not on figures published in earlier briefs, because EIA may revise its underlying data.

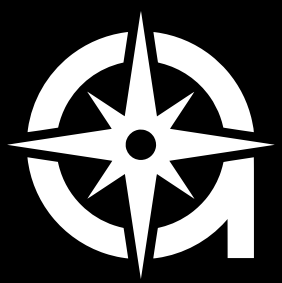
The data are from the EIA Annual Electric Generator Report (Form EIA-860), for the years that are available. Where annual data are not yet available, the data are from the EIA Preliminary Monthly

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. All projects that will be "primarily fueled by energy sources other than coal or nuclear energy expected to begin commercial operation within five years" are included in the data, for coal and nuclear projects, it includes all projects expected to begin operation within 10 years. The dataset only includes projects one megawatt or larger. The first clean power projects in the data date to before 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 onward. These values may not correspond to actual past or future investment by energy 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

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.



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