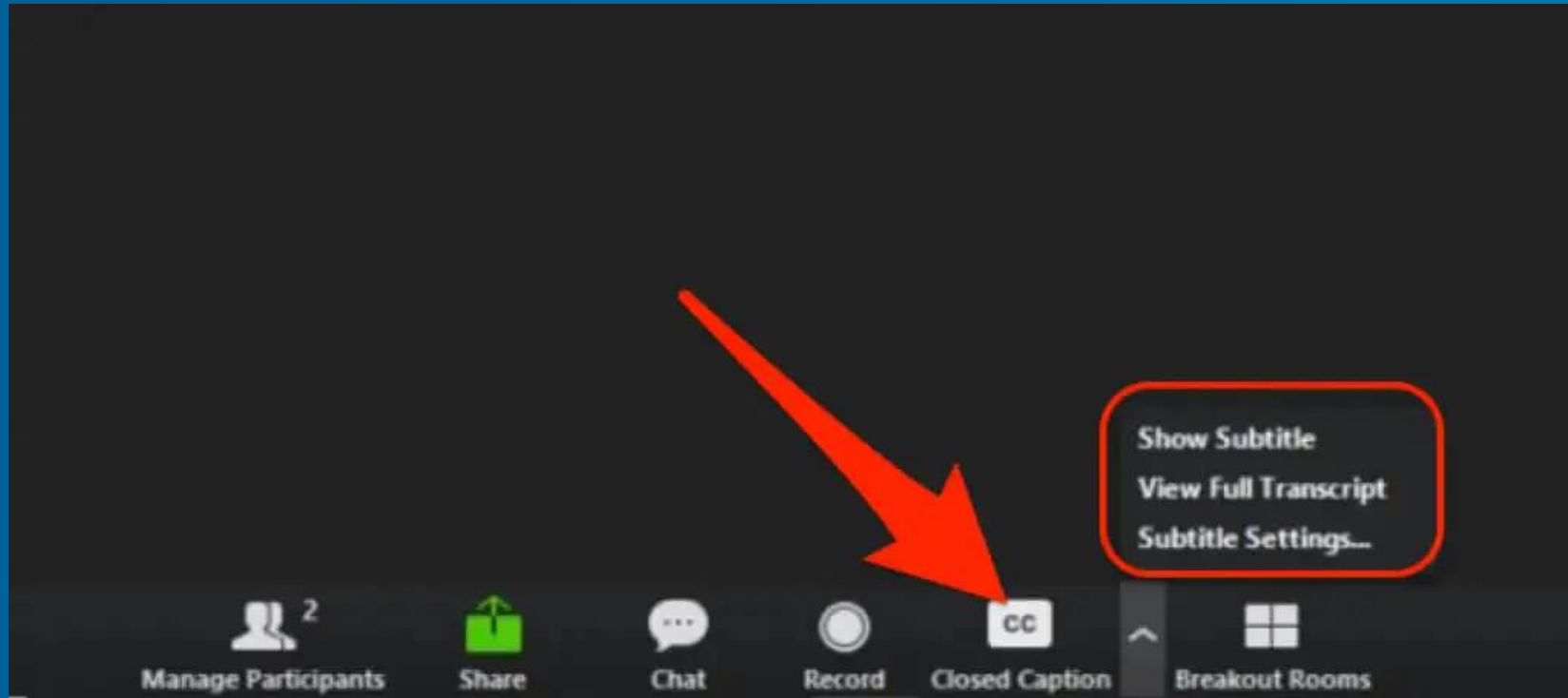


ACP Clean Power Market Report Q2 2025

September 2, 2025



Closed Captions



Today's Program is Being Recorded

- The recording will be available to you in a follow up email
- The slides are available under the Resources icon of your Zoom menu, in the Documents tab, as a downloadable pdf.



Engage With Us During the Program

- Use the Q&A panel
- Share your comments or handles in the chat
- Emojis



Speakers



John Hensley

*SVP, Markets and Policy
Analysis*

ACP



Kelsey Hallahan

*Sr. Director, Market
Intelligence*

ACP

Q2 2025 Clean Power Market Report:

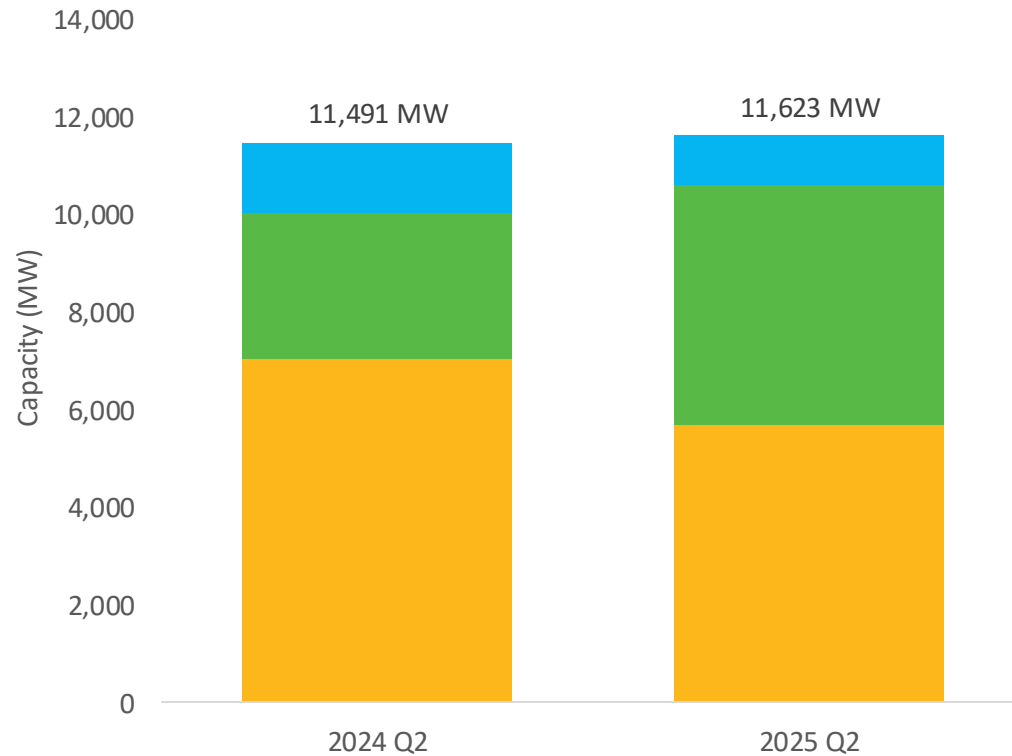
- Members will receive an email notification
- Nonmembers may access a public version
- Reports can be found: cleanpower.org/resources



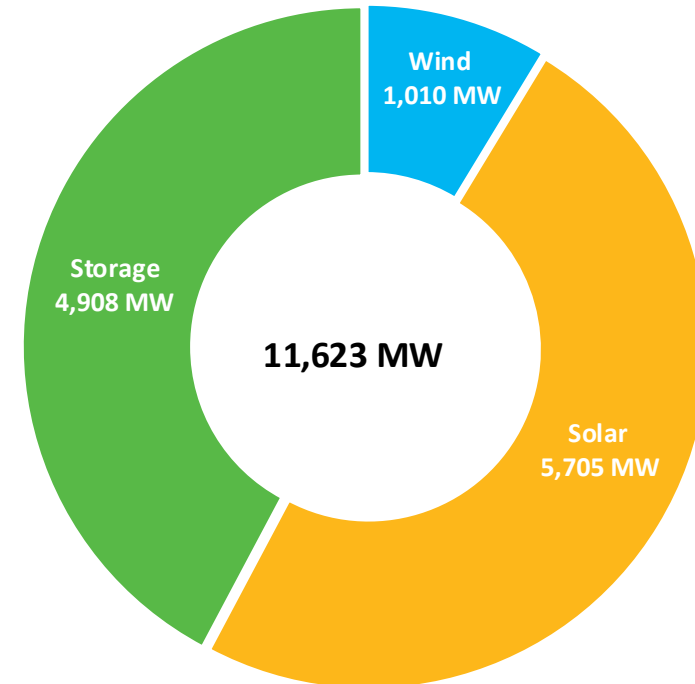
Q2 2025 Clean Power Installations

Developers added 11.6 GW of new clean power capacity in Q2 2025

Clean Power Installations, 2024 Q2 vs. 2025 Q2



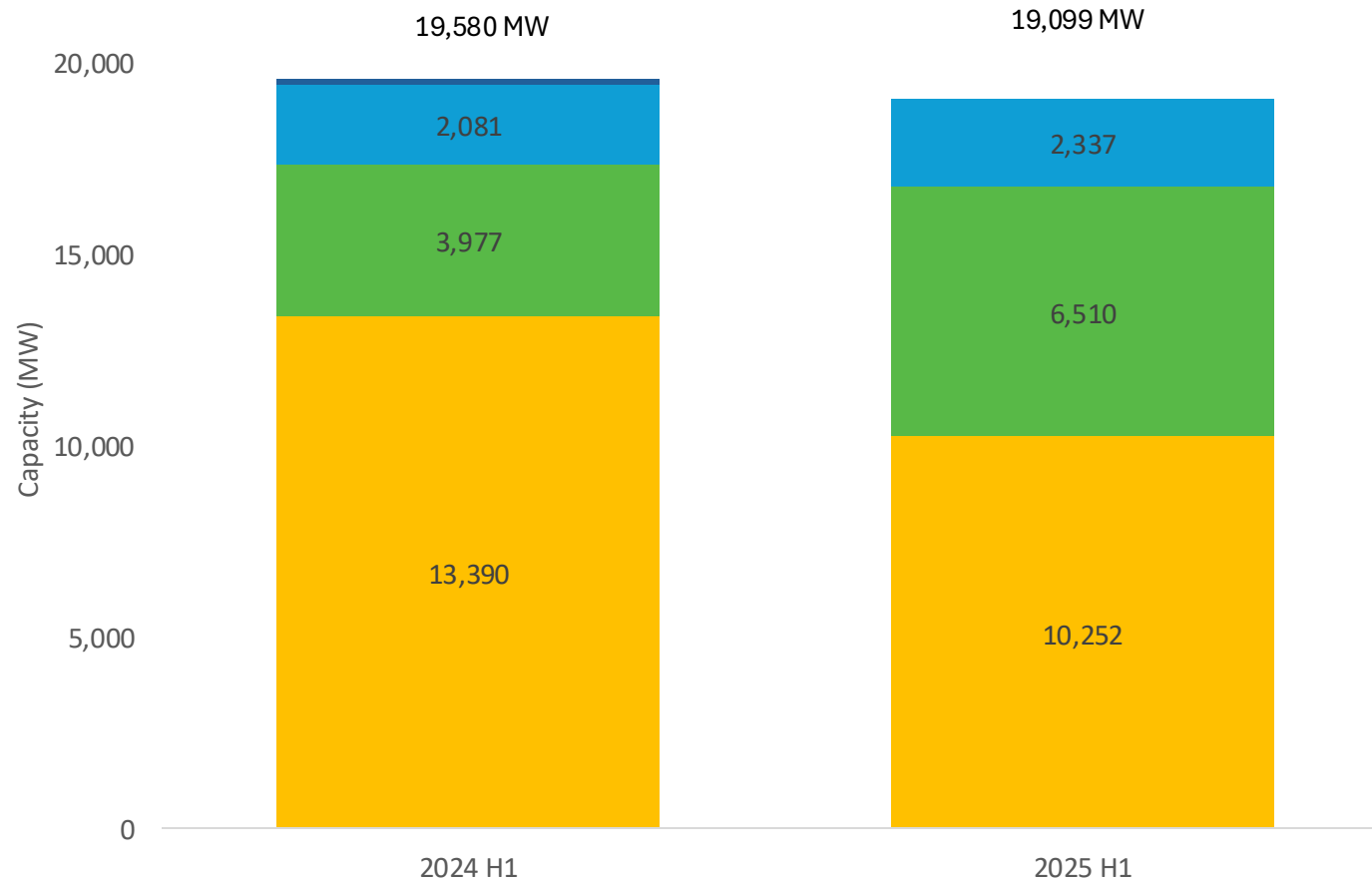
Clean Power Deployments in Q2 2025 by Technology



2025 at Mid-Year

H1 2025 trailed H1 2024 deployments by 2.5%

Clean Power Installations, 2024 H1 vs. 2025 H1



Land-Based Wind



Installations up 12%

Battery Storage



Installations up 63%

Utility-Scale Solar

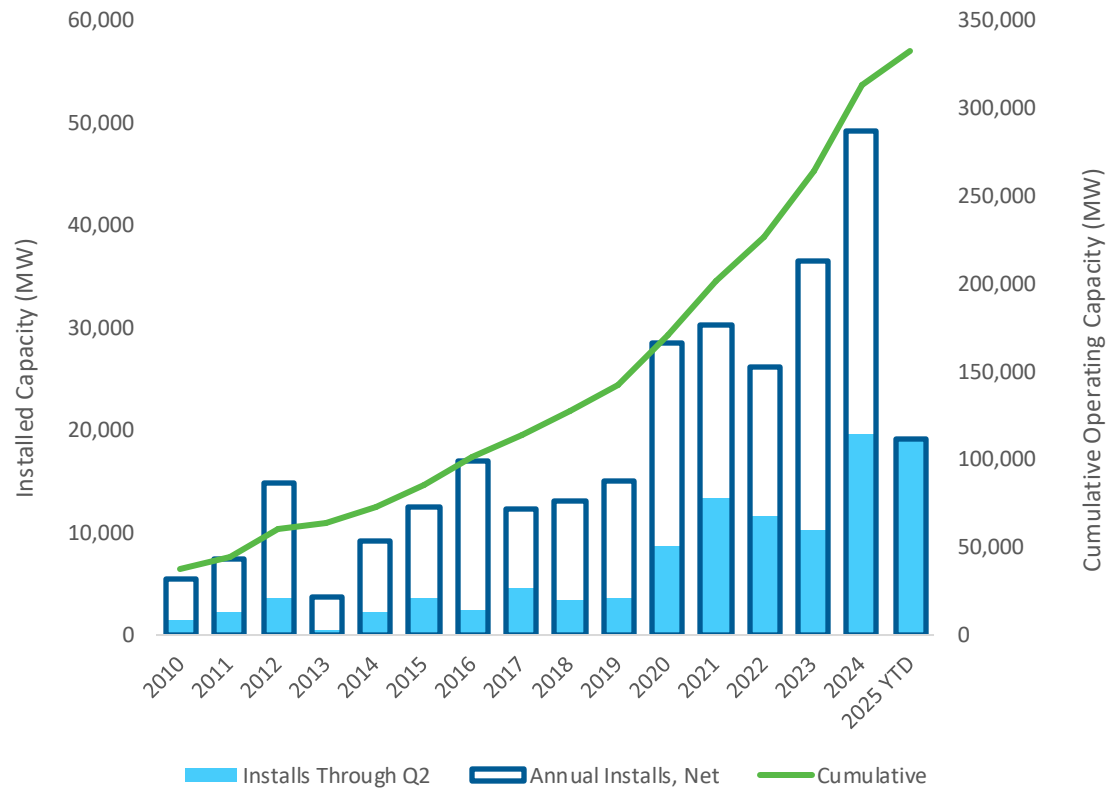


Installations down 23%

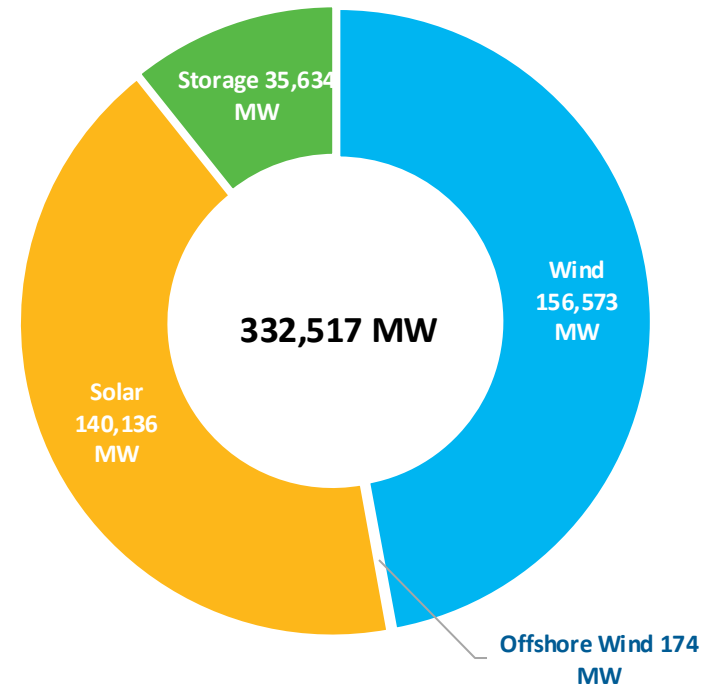
Operational U.S. Clean Power Capacity

Operational clean power capacity reached 332.5 GW in Q2 2025

Annual and Cumulative Clean Power Capacity Additions (MW)



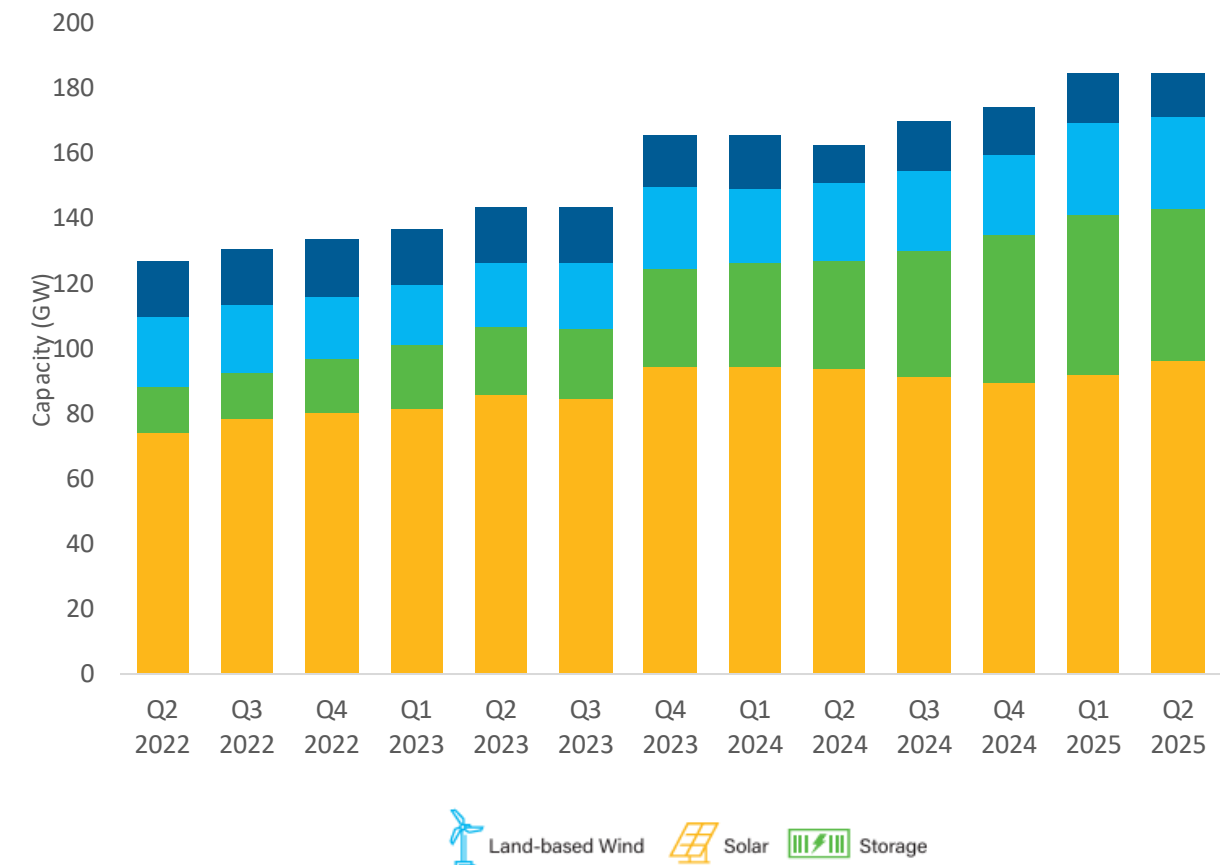
Operational Clean Power Capacity by Technology



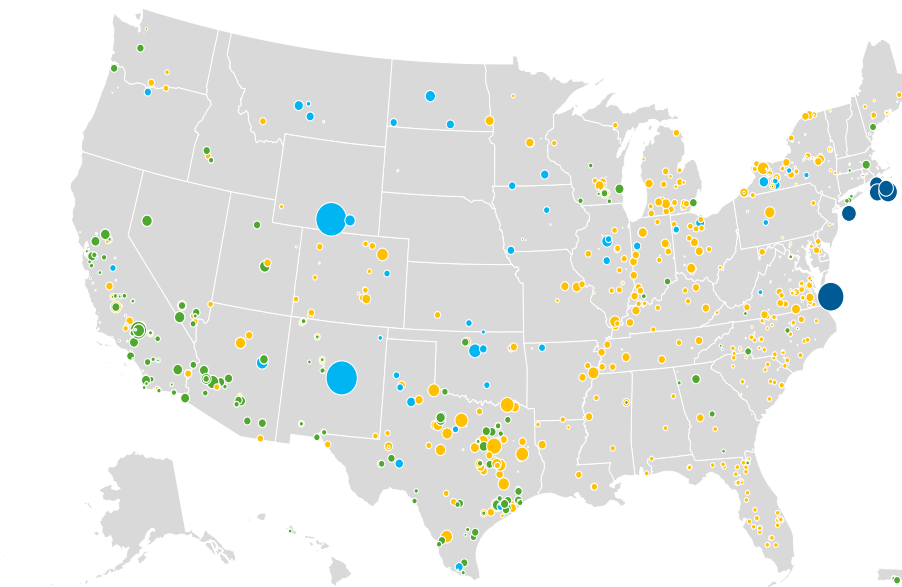
Clean Power Pipeline

Clean power pipeline stalls at 184.5 GW, up just 100 MW from Q1 2025

Clean Power Pipeline Over Time



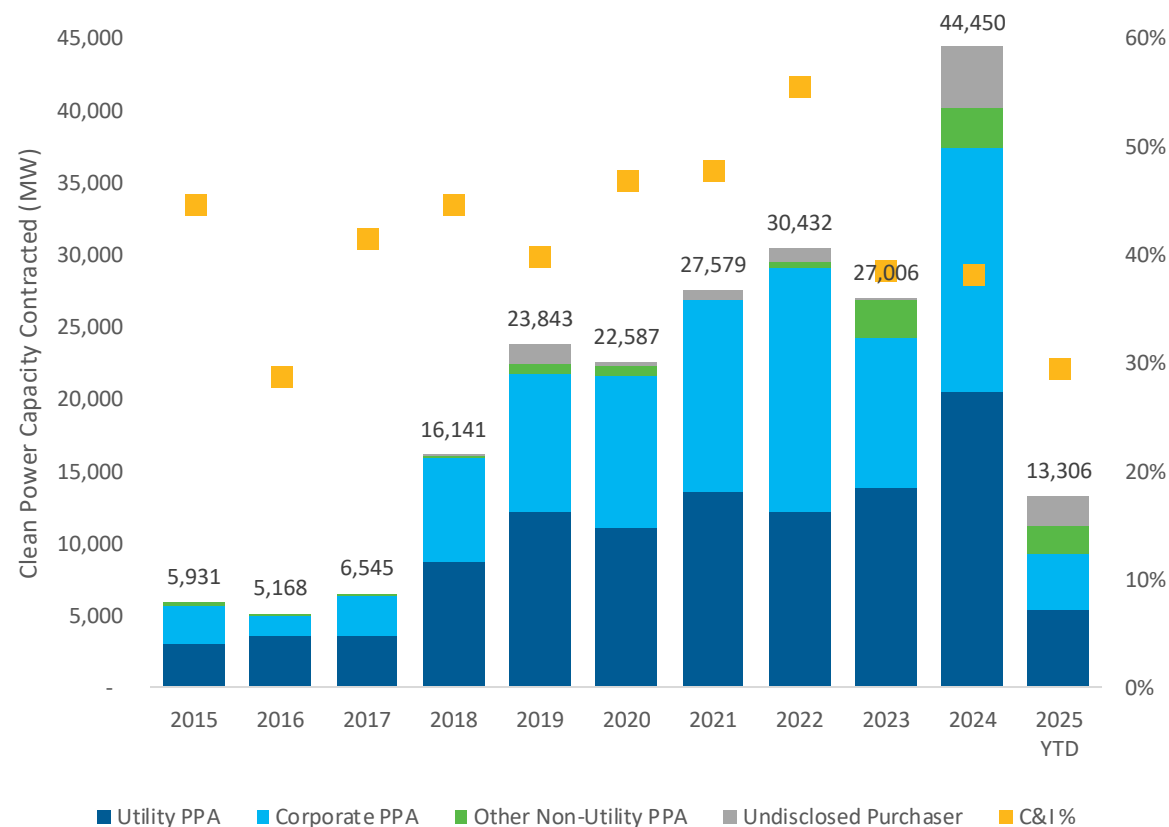
Geography of the Clean Power Pipeline



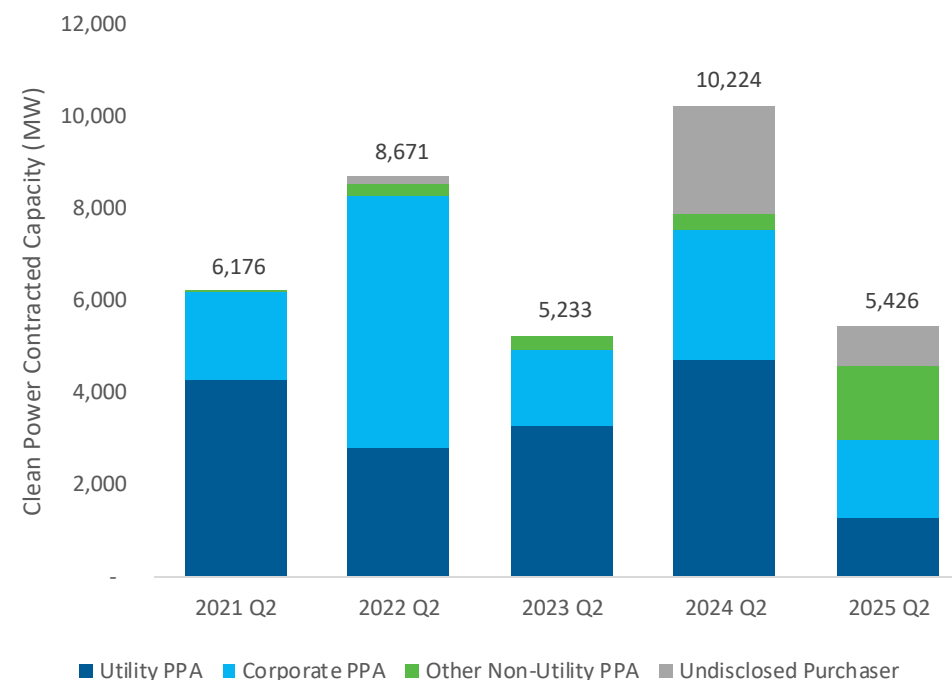
Clean Power Buying

PPA announcements drop 47% year-over-year amid uncertainty

PPA Announcements by Year, Type



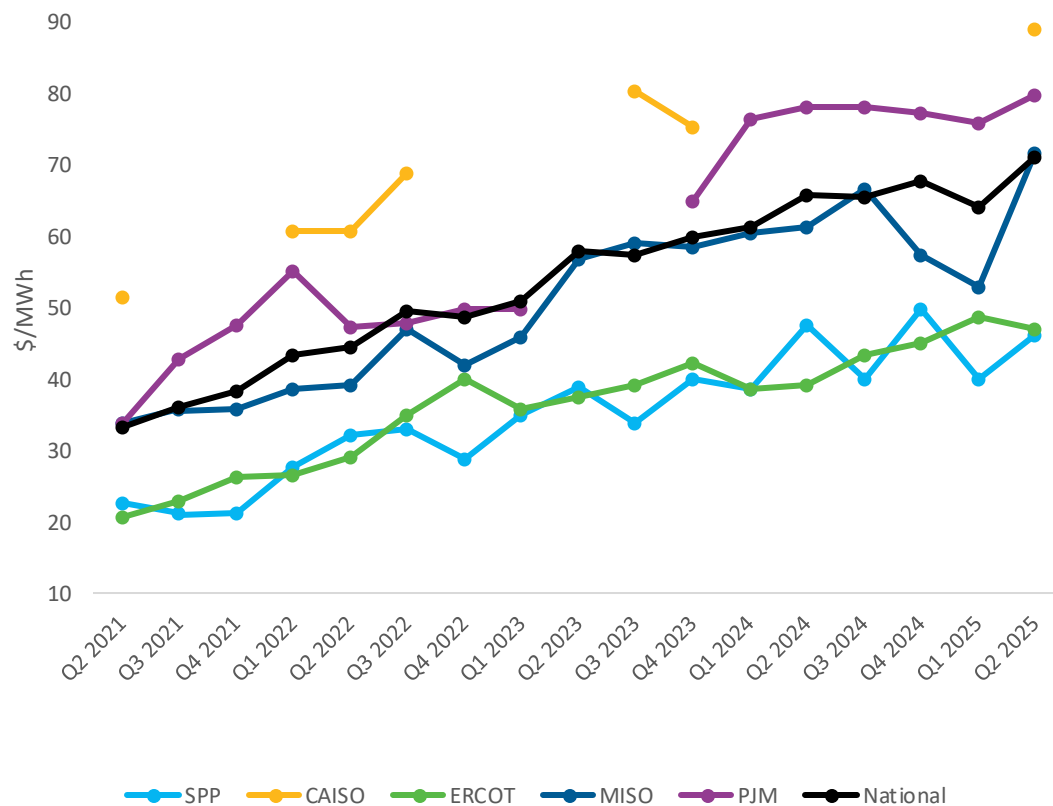
Q2 PPA Announcements, 2021-2025



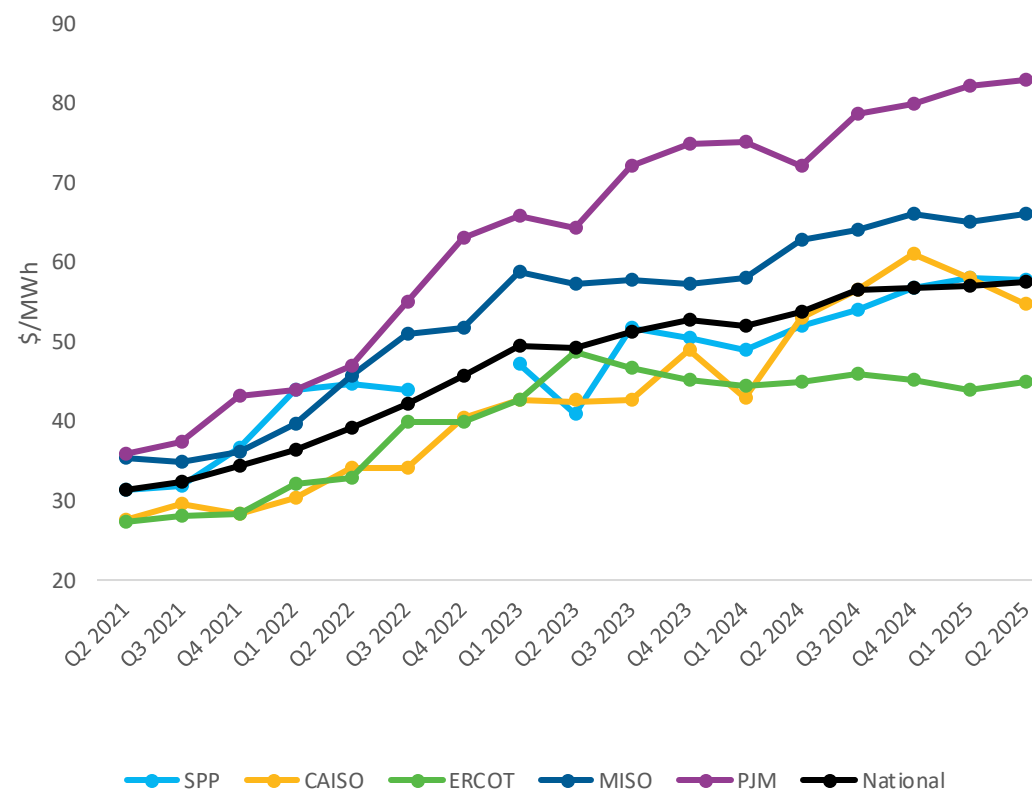
PPA Pricing Trends

Wind and solar PPA prices continue upward trend

Wind PPA Prices, Q2 2021 – Q2 2025



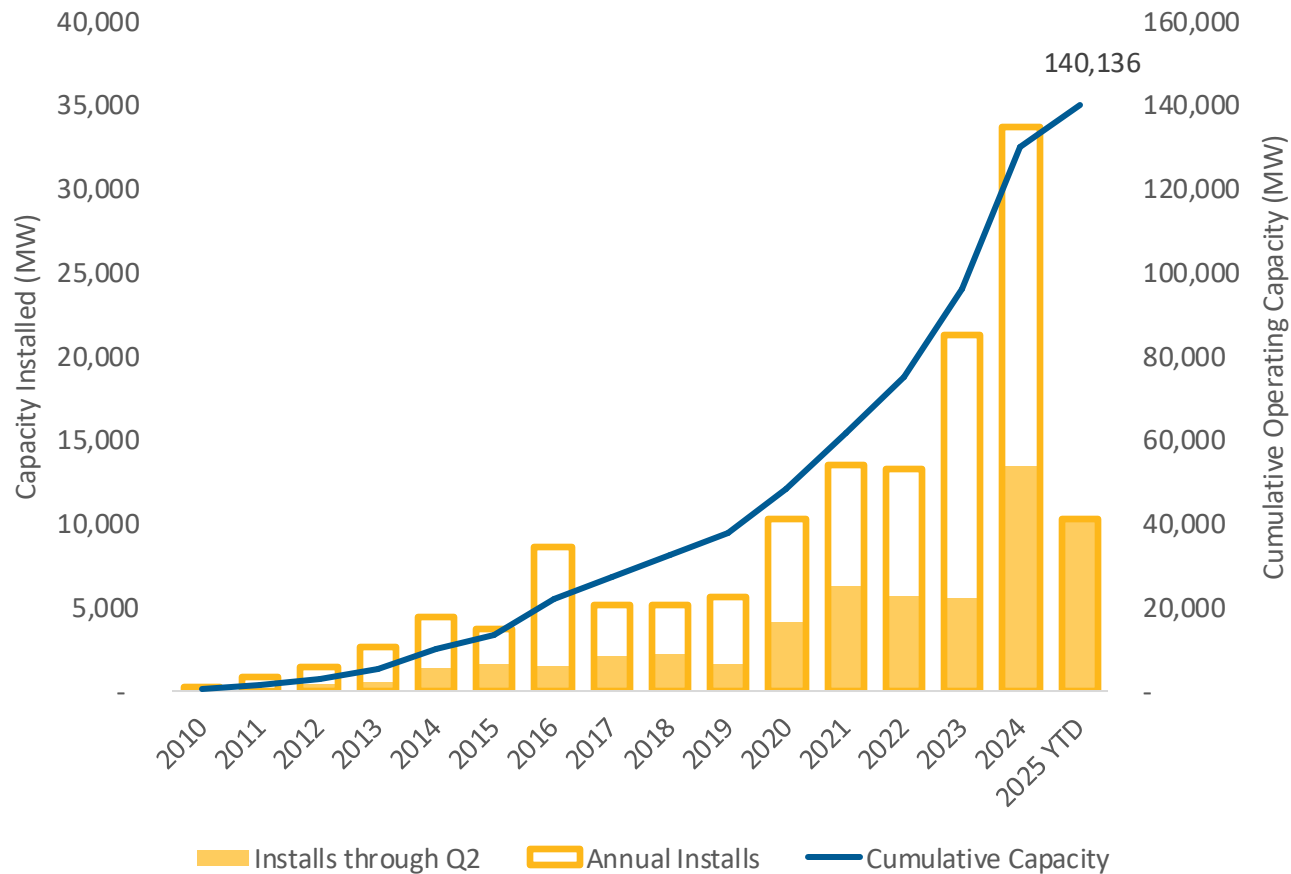
Solar PPA Prices, Q2 2021 – Q2 2025



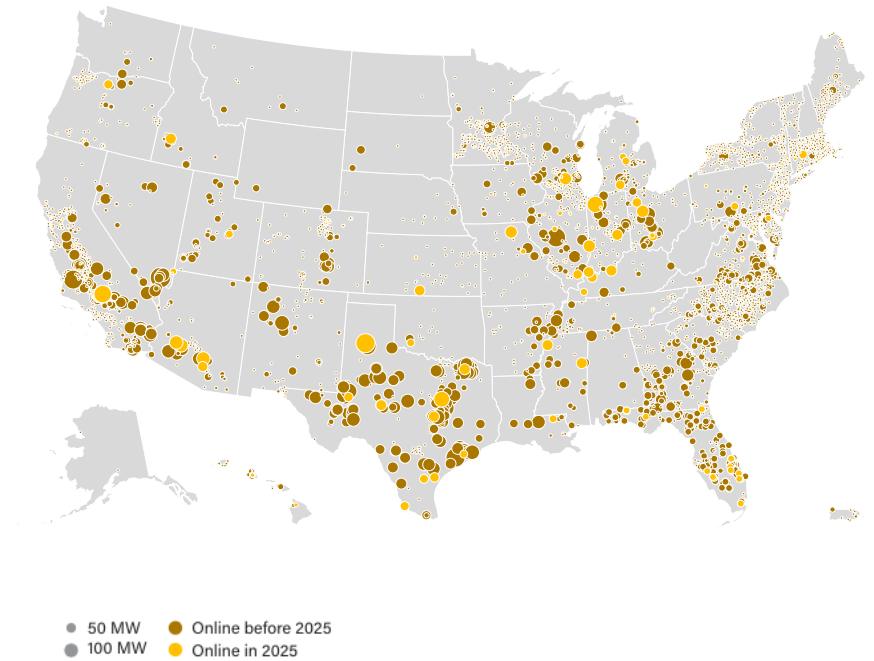
Utility-Scale Solar Activity

Utility-scale solar in operation surpasses 140 GW in Q2 2025

Annual and Cumulative Utility-Scale Solar Additions



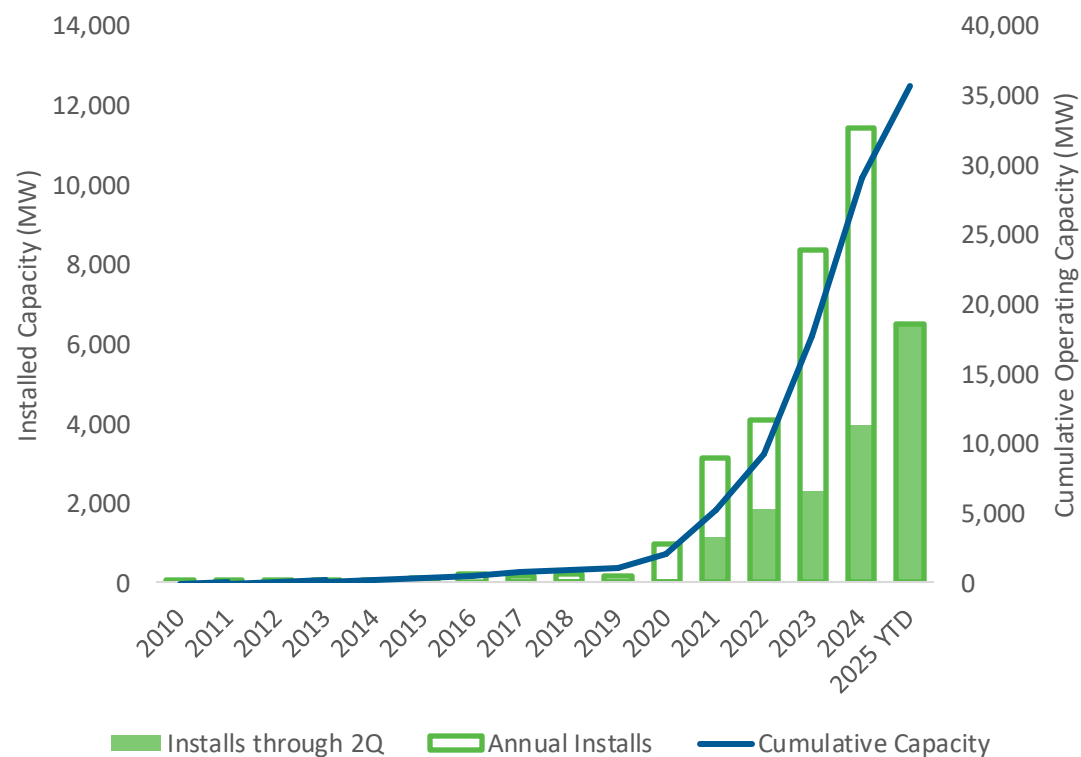
Geography of Utility-Scale Solar Capacity



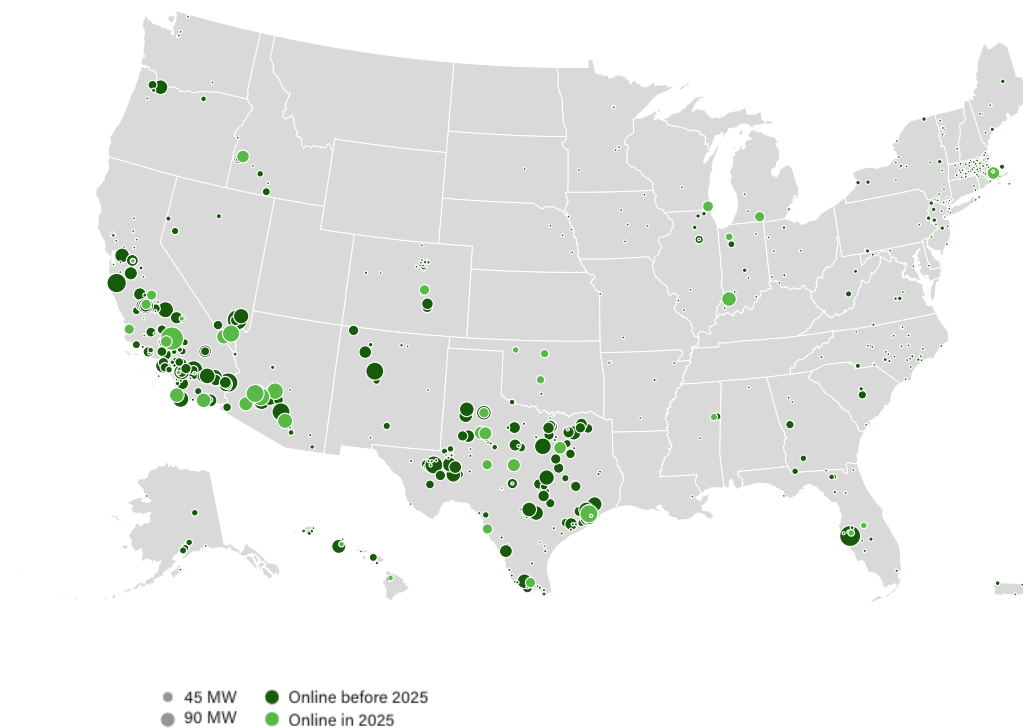
Battery Storage Activity

Battery storage on track for record-year of deployments with strongest H1 yet

Annual and Cumulative Battery Storage Additions



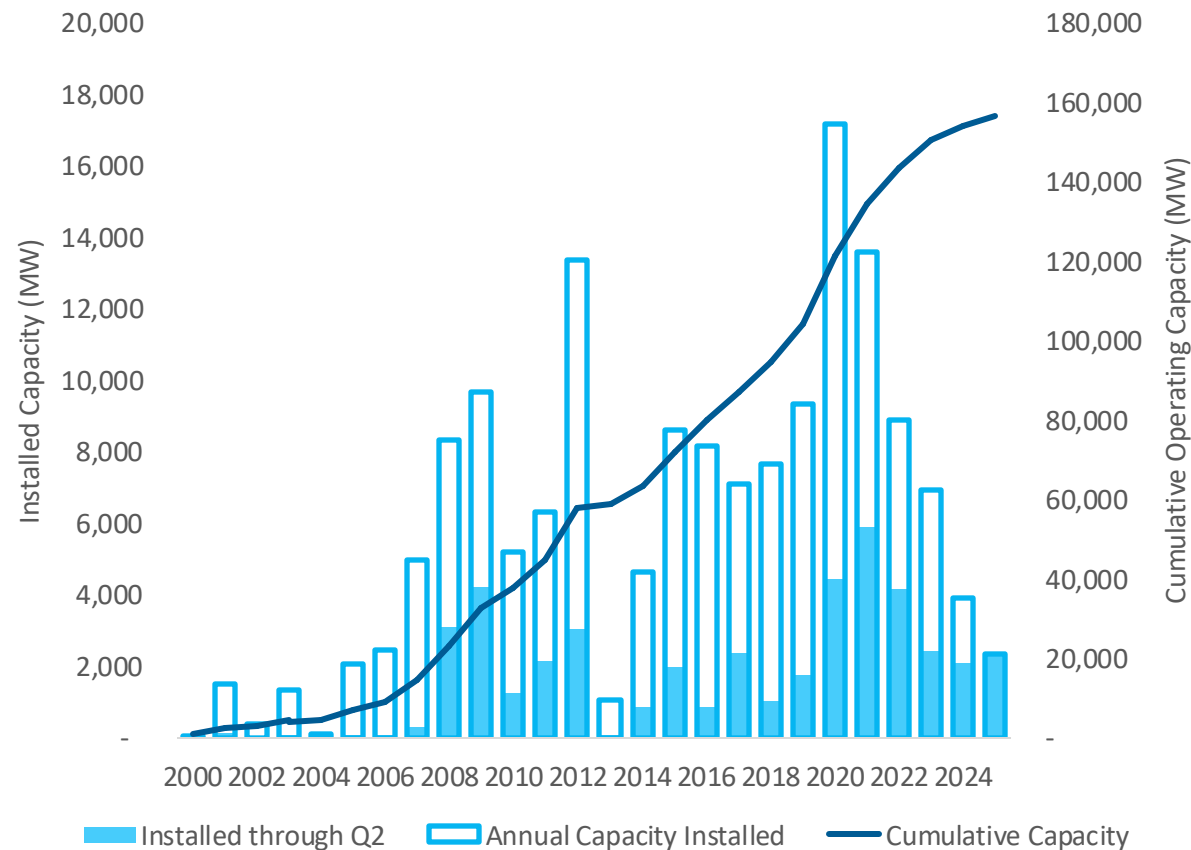
Geography of U.S. Battery Storage Capacity



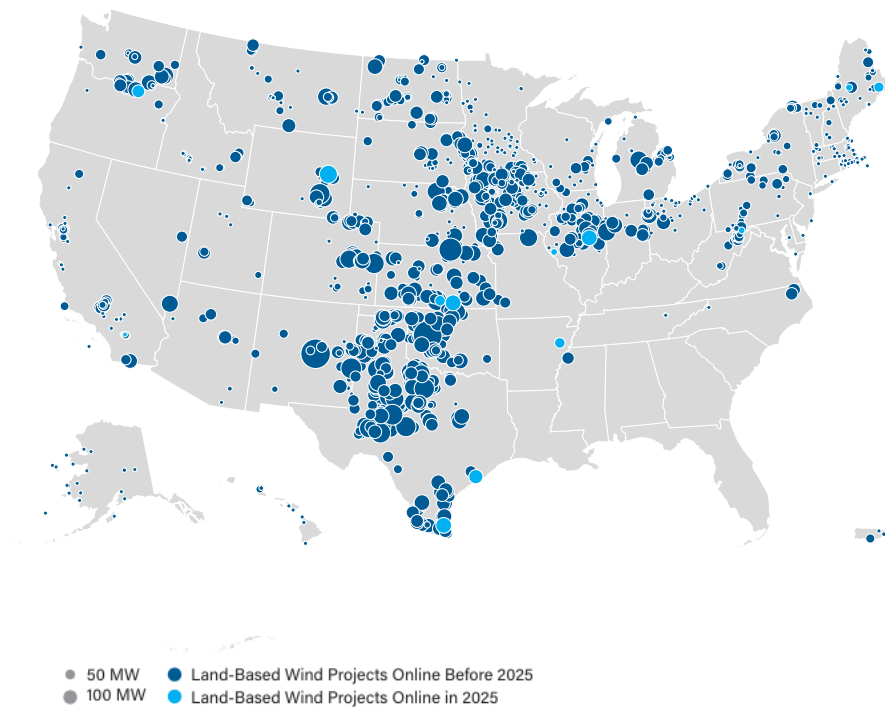
Land-Based Wind Activity

Land-based wind capacity in operation reaches 156.6 GW

Annual and Cumulative Land-Based Wind Additions



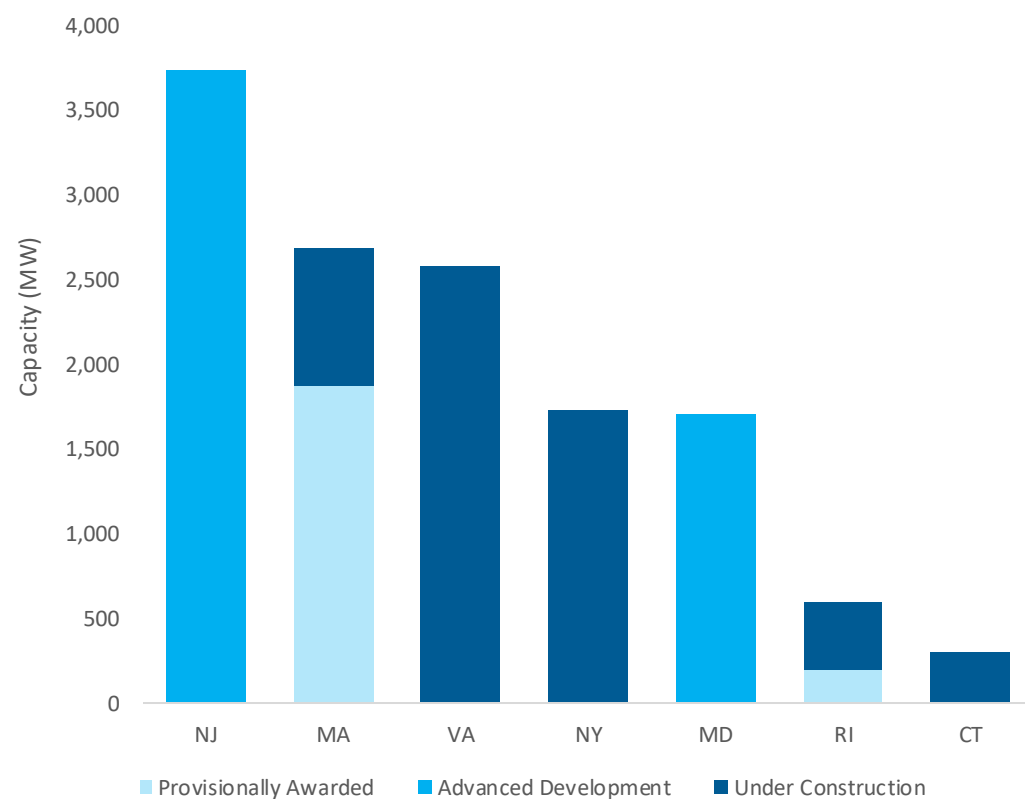
Geography of U.S. Land-Based Wind Capacity



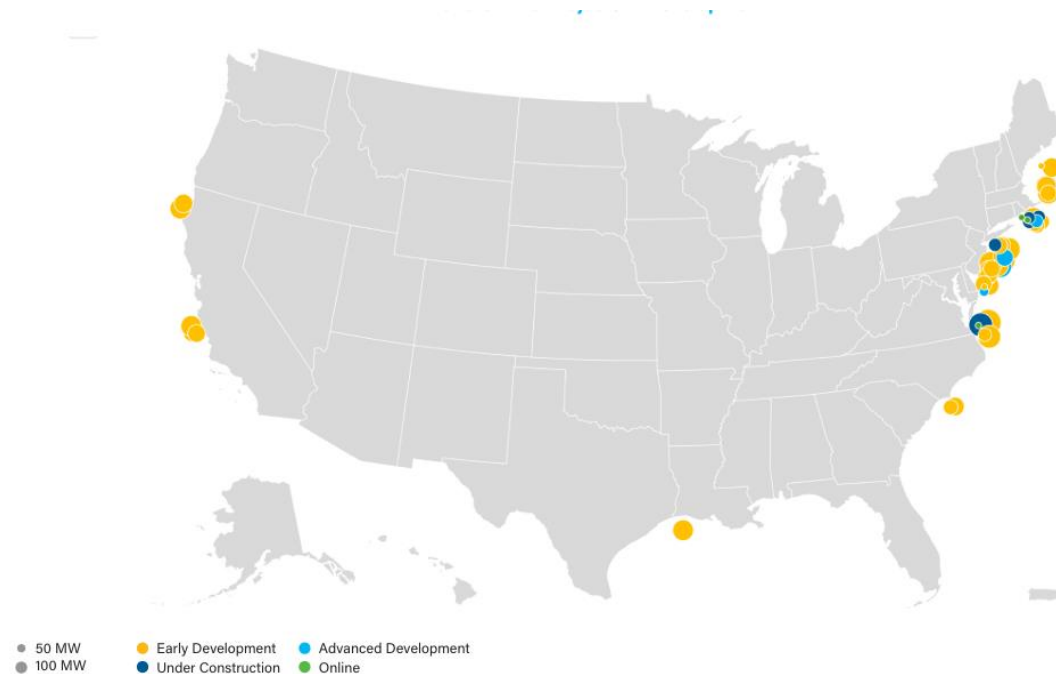
Offshore Wind Activity

Seven states have contracted offshore wind capacity, totaling 11.3 GW

Contracted Offshore Wind Capacity by State



Geography of U.S. Offshore Wind Capacity



More ACP Resources

Report Data Appendices

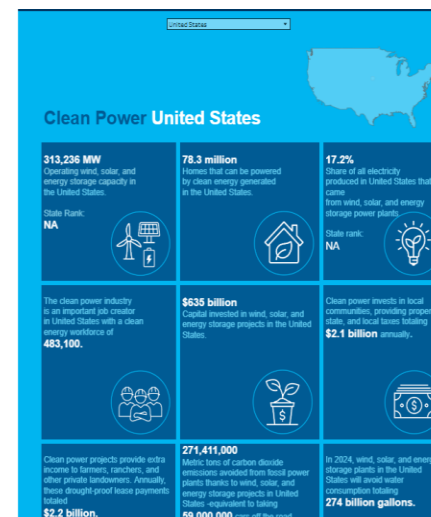
Home > Resources >

Clean Power Annual Market Report | 2024

ACP's flagship report finds increasing investment in clean power in 2024

[Download the report](#) [Download Appendices](#)

State Factsheets



CleanPowerIQ

CleanPowerIQ Data Search Wind Speed Maps State Fact Sheets

Home > Data Search

Search Type

☒ Projects ☐ Turbines ☐ Supply Chain

Technology Project Name State

Phase Name Country Phase Size

Company Involvement

Developer Owner Power Purchaser Type

Technology

Upcoming reports

- Energy Storage Monitor (*partner report with Wood Mackenzie*): Sept. 2025
- Wind Energy Monitor (*partner report with Wood Mackenzie*): October 2025
- Q3 2025 Market Report: December 2025

CleanPowerIQ: New Look

ACP has launched a new, data visualization-focused version of CleanPowerIQ

Project Search

Technology

All

Project Name

All

State

All

Status Year

All

Phase Name

All

Secondary Offtake Type

All

Phase Size

All

Offtake Types

All

Company Involvement

Developers

All

Owners

All

Power Purchaser Types

All

Power Purchasers

All

Technology

Manufacturers

All

Model

All

Nameplate Capacity MW

All

Hybrid

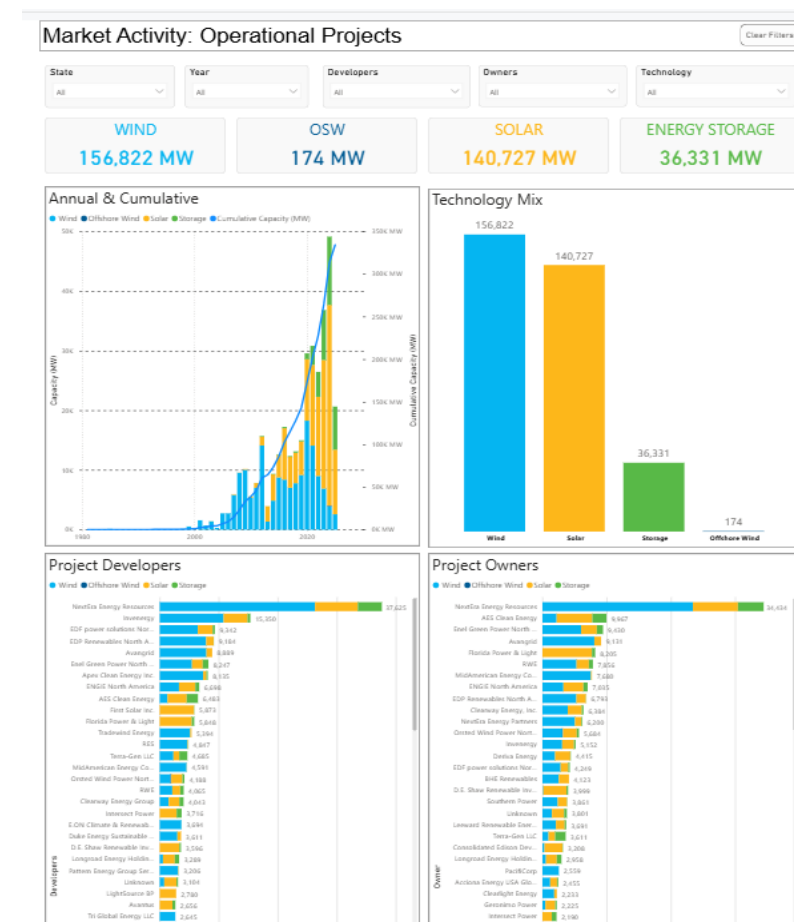
All

Storage Durations

All

Ask Research

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For more information: <https://cleanpower.org/cleanpower-iq/>

Questions?

Thank You!



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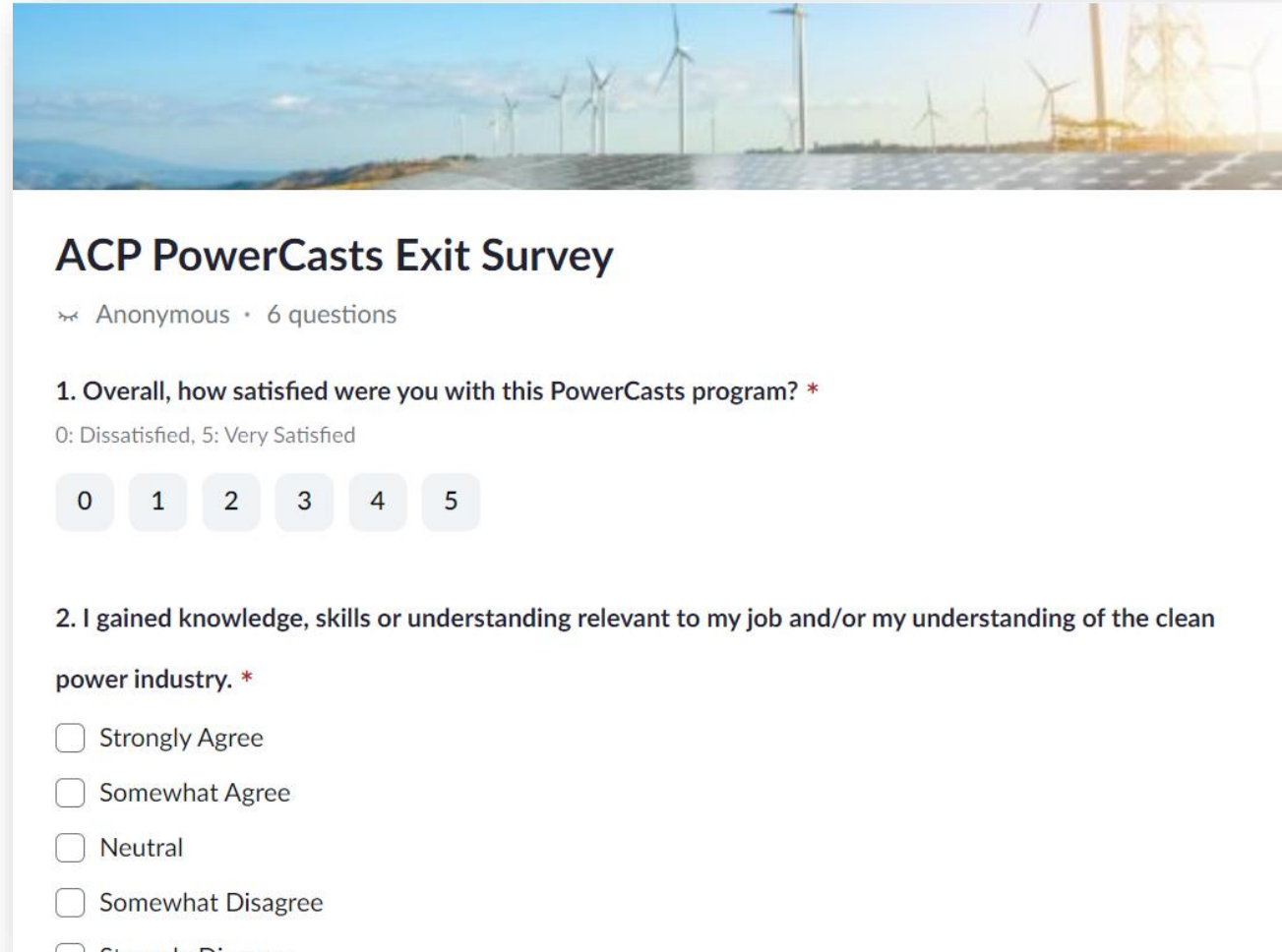
Membership

Contact us.

Membership@cleanpower.org



Please Complete Our Exit Survey

A screenshot of a web-based exit survey titled "ACP PowerCasts Exit Survey". The header image shows a landscape with solar panels in the foreground and wind turbines in the distance under a clear sky. The survey is anonymous and consists of 6 questions. The first question asks for overall satisfaction with the PowerCasts program, with a scale from 0 (Dissatisfied) to 5 (Very Satisfied). The second question asks if the respondent gained knowledge, skills, or understanding relevant to their job or the clean power industry, with radio button options for Strongly Agree, Somewhat Agree, Neutral, Somewhat Disagree, and Strongly Disagree.

ACP PowerCasts Exit Survey

Anonymous • 6 questions

1. Overall, how satisfied were you with this PowerCasts program? *

0: Dissatisfied, 5: Very Satisfied

0 1 2 3 4 5

2. I gained knowledge, skills or understanding relevant to my job and/or my understanding of the clean power industry. *

☐ Strongly Agree

☐ Somewhat Agree

☐ Neutral

☐ Somewhat Disagree

☐ Strongly Disagree



Thank you!

