



US wind energy monitor

Q3 2025

Joint report from Wood Mackenzie and
the American Clean Power Association



Executive summary

New tariff and national security investigation risks nearly eclipse "positive" Treasury ruling: 3.1% quarter-over-quarter forecast increase projected

1 The US wind industry will add **46 GW through 2029** (35.5 GW onshore, 6 GW offshore, 4.5 GW repowering), **peaking at 12.3 GW in 2027**. A manageable Q4 connection blitz of 4.2 GW, representing 51% of 2025 capacity, follows historical patterns. However, the forecasts face a 22% downside risk mainly after 2026 due to increasing permitting delays and tariff complications affecting onshore projects.

2 **Treasury guidance drives 2027 installation surge:** Confirmation of the Physical Work Test for start-of-construction definition and the four-year construction window underpins production tax credit (PTC) eligibility, boosting the onshore new-build wind outlook by 7% as developers fast-track shovel-ready projects. Despite this positive guidance and the immediate forecast uplift, momentum is front-loaded to 2027.

3 **Tariff probe heightens late-decade project uncertainty:** Positive Treasury guidance was expected to boost orders, but the tariff investigation is delaying 2029–2030 investment decisions. Turbine OEMs face difficulty forecasting component costs and availability, while potential supplementary tariffs could inflate one-third of total project capex, creating downside risk for late-decade installations.

4 **Wind projects demonstrate market resilience despite political headwinds:** Wind continues to secure Interconnection Service Agreements (ISAs) in 2025 despite anti-wind rhetoric. The technology maintains meaningful market presence even as solar and storage lead interconnection activity, with leadership concentrated in SPP and ERCOT.





Europe +44 131 243 4477
Americas +1 713 470 1700
Asia Pacific +65 6518 0888
Email contactus@woodmac.com
Website www.woodmac.com

Wood Mackenzie™ is a trusted intelligence provider, empowering decision-makers with unique insight on the world's natural resources. We are a leading research and consultancy business for the global energy, power and renewables, subsurface, chemicals, and metals and mining industries.

For more information visit: woodmac.com

WOOD MACKENZIE is a trademark of Wood Mackenzie Limited and is the subject of trademark registrations and/or applications in the European Community, the USA and other countries around the world.

