CLEAN POWER QUARTERLY

AMERICAN CLEAN POWER

2026 Q2

Market Report

Definitions

Advanced development: Projects not under construction, but with a PPA, firm equipment order, or moving forward with plans to be placed under utility ownership as of the end of the most recent quarter. For offshore wind, advanced development consists of projects that have secured offtake or have had successful bids in response to a state solicitation even if final offtake negotiations have not concluded.

Capacity: Project nameplate capacity. Unless otherwise stated, ACP reports capacity in MW-ac.

Clean power: For the purposes of this report, clean power includes land-based wind, offshore wind, utility-scale solar, and battery storage technology.

Decommissioned: Project is offline and is no longer delivering power to the grid on a permanent basis. Physical removal of equipment is not a requirement.

Duration: The amount of time, in hours, a battery can discharge its power capacity before depleting its energy capacity. For example, a 2 MW battery that has 4 MWh of energy capacity has a duration of 2 hours.

Full repowering: Full decommissioning of a utility-scale project. The original equipment is physically removed from the project site and replaced with new utility-scale equipment.

Inverter Loading Ratio (ILR): The ratio of installed DC capacity to the inverter's AC power rating. Also known as the AC-to-DC ratio.

Online: Project has reached commercial operation and is delivering electricity to the ultimate point of delivery.

Partial repowering, nacelle replacement: Complete replacement of a utility-scale wind turbine's nacelle, rotor, and blades. The tower and foundation are retained.

Partial repowering, major retrofit: Complete replacement of a utility-scale wind turbine's rotor and blades, along with the replacement of at least one major component within the nacelle, typically the gearbox or the generator.

Pipeline: Projects either under construction or in advanced development.

Repowered: Full or partial equipment replacement. Currently only wind repowering activity is tracked, but ACP will expand repowering activity tracked as the market progresses.

Under construction: Construction team has begun work on the ground at the project site. For offshore wind, under construction is defined as in-ocean construction.

Acronyms

AC	Alternating Current
C&I	Commercial & Industrial
CAISO	California ISO
DC	Direct Current
ERCOT	Electric Reliability Council of Texas
GW	Gigawatts
GWh	Gigawatt hours
ILR	Inverter Loading Ratio
IOU	Investor-Owned Utility
ISO	Independent System Operator
MISO	Midcontinent Independent System Operator
MW	Megawatts
MWh	Megawatt hours
NE-ISO	New England ISO
NYISO	New York ISO
OEM	Original Equipment Manufacturer
PJM	Pennsylvania-New Jersey-Maryland Interconnection
PPA	Power Purchase Agreement
REC	Renewable Energy Certificate
RTO	Regional Transmission Organizations
SPP	Southwest Power Pool

KEY TAKEAWAYS

2026 Q2 Highlights

Developers add 17.1 GW of new clean power capacity in Q2 2026

- The industry brought online 17,058 MW of new utility-scale solar, battery storage, and land-based wind capacity in the second quarter of 2026, up 45% from the same quarter in 2025.
- Cumulative clean power capacity now sits at 387,606 MW, enough to power more than 83 million American homes.

Battery storage deployments pass the 50 GW milestone

- With 4,685 MW/17,177 MWh of new capacity added in the second quarter, operational battery storage capacity reached 52,945 MW.
- Storage deployments passed 25 GW in 2024, 10 GW in 2023, and 5 GW in 2021. With 56 GW in the pipeline, storage is on pace to see 100 GW installed by the end of the decade.

Strong Q2 for land-based wind installations, but federal obstruction stifles pipeline growth

- Nearly 5 GW of land-based wind capacity was connected to the grid in Q2, led by the commissioning of the largest U.S. land-based wind project to date, Pattern Energy's SunZia Wind.
- While the robust deployments made Q2 2026 the technology's strongest Q2 on record, the land-based wind pipeline fell 4% to 27,381 MW in Q2, as a months-long refusal at the U.S. Department of Defense to review wind turbine applications has blocked 155+ wind projects from progressing.

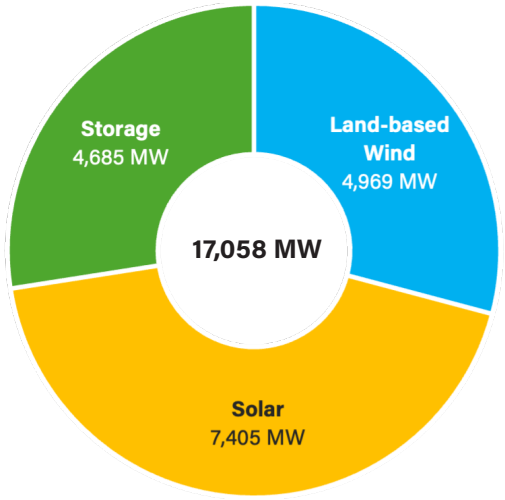
Clean power pipeline crosses the 200 GW mark, up 11% y-o-y

- The clean power pipeline reached 204,568 MW by the end of Q2 2026, up nearly 10 GW (5%) from the first quarter and 20 GW higher than the same quarter in 2025.
- Utility-scale solar experienced the strongest quarterly pipeline growth of any technology, rising 7.7 GW, or 7%, from Q1 to a record 111 GW. This marked an acceleration in the solar growth rate, having averaged 3% growth over the previous four quarters.

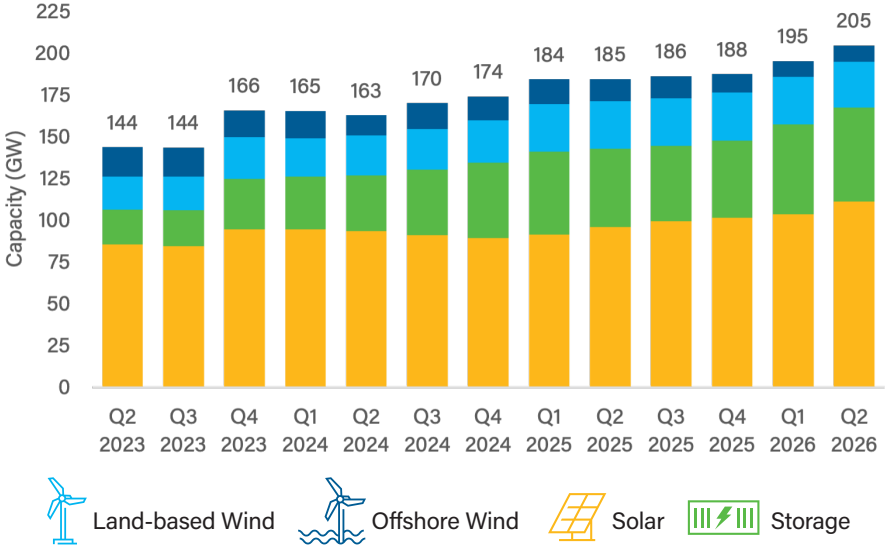
Clean power buyers announce 14.5 GW of new offtake agreements

- Clean power procurement announcements totaled 14,500 MW in Q2 2026, up 23% from the same quarter in 2025.
- Power purchase agreement announcements for H1 2026 are at an all-time high of 21,616 MW and direct utility ownership is at a four-year high of 4,637 MW.

Q2 2026 Clean Power Deployments



Clean Power Pipeline Growth

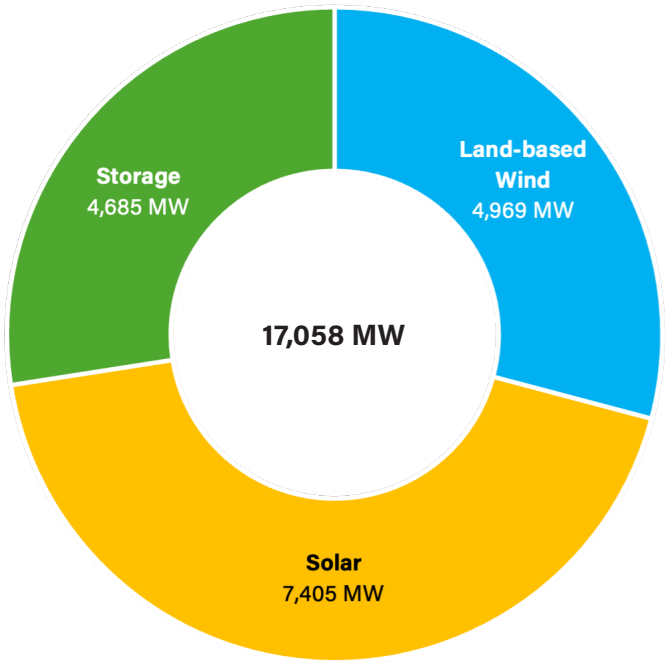


CLEAN POWER CAPACITY GROWTH

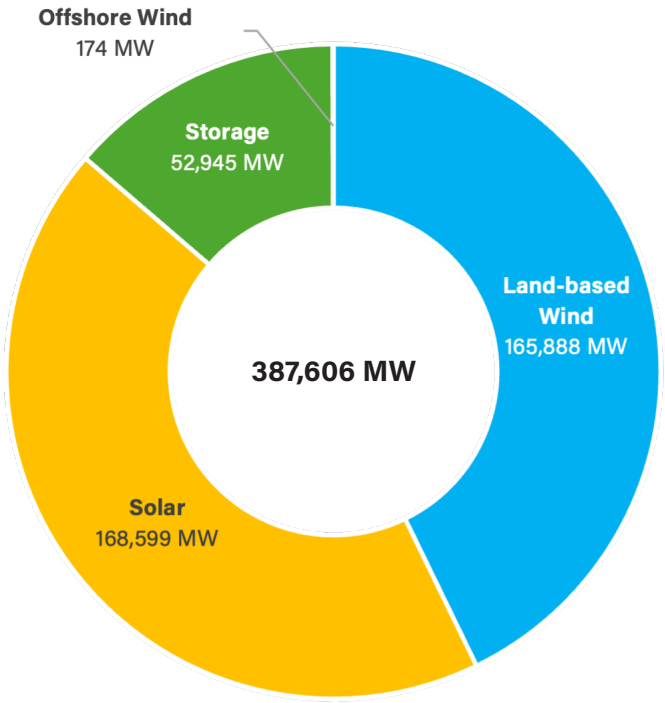
Q2 2026 Clean Power Capacity Additions

- Project developers placed in service 164 utility-scale solar, battery storage, and land-based wind projects during the second quarter of the year, adding 17,058 MW of clean power capacity to the grid.
- Quarter-over-quarter, second quarter installations outpaced the 6,860 MW added in Q1 2026 by more than 10 GW. Year-over-year, quarterly capacity installations were up by 45% compared to the 11,758 MW of capacity energized in Q2 2025. Across all second quarters, 2026 marks the strongest Q2 for installations on record.
- By technology, 7.4 GW of utility-scale solar capacity was commissioned during the second quarter, representing 43% of capacity additions. Land-based wind installations jumped in Q2 with nearly 5.0 GW of project capacity brought online. Following closely, 4.7 GW of battery storage capacity was installed during the quarter. Land-based wind and battery storage accounted for 29% and 27% of quarterly adds, respectively.
- At the end of Q2 2026, the fleet of operational clean power projects in the U.S. reached 387,606 MW, enough to power 83.2 million American homes.

Q2 2026 Clean Power Installs by Technology

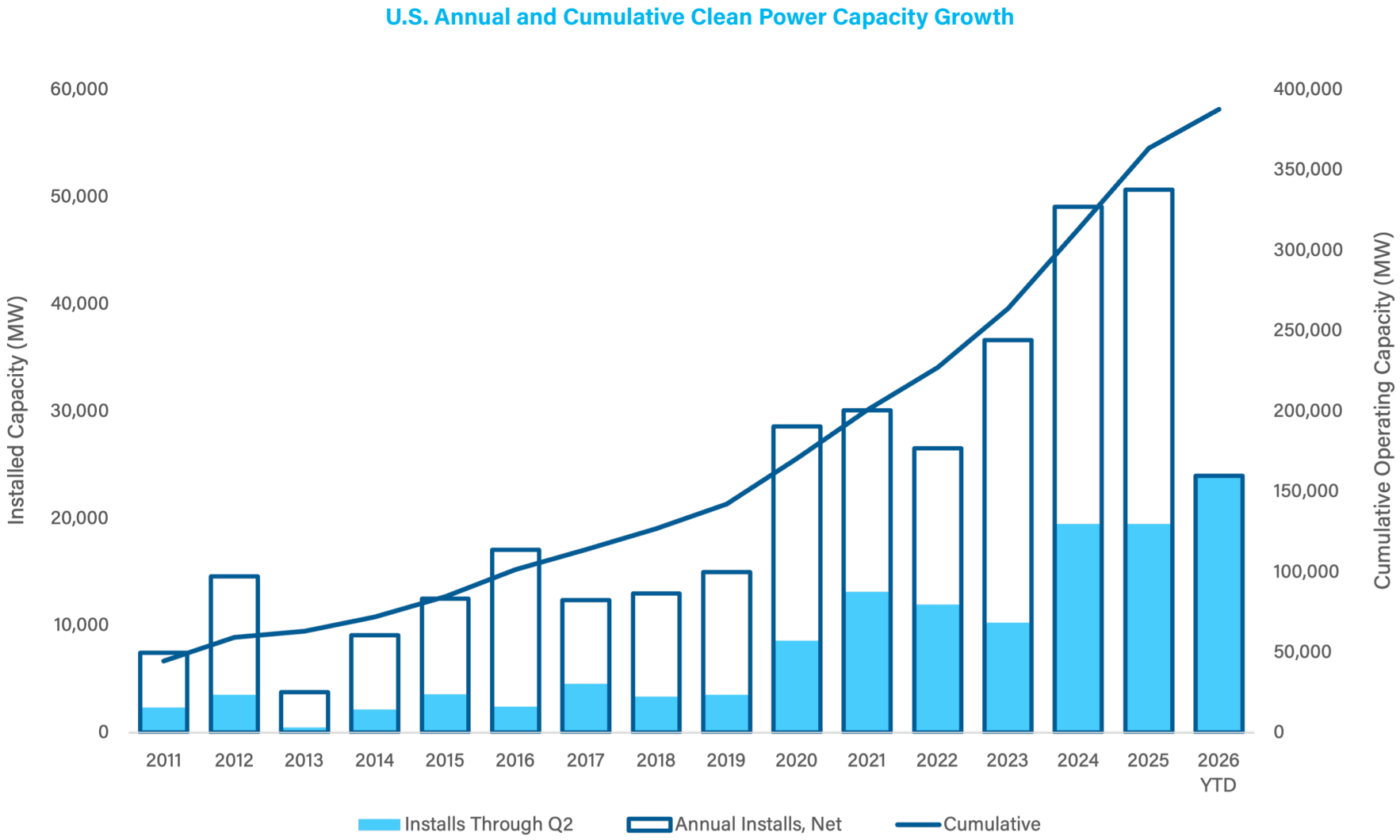


Total Operating Clean Power Capacity by Technology



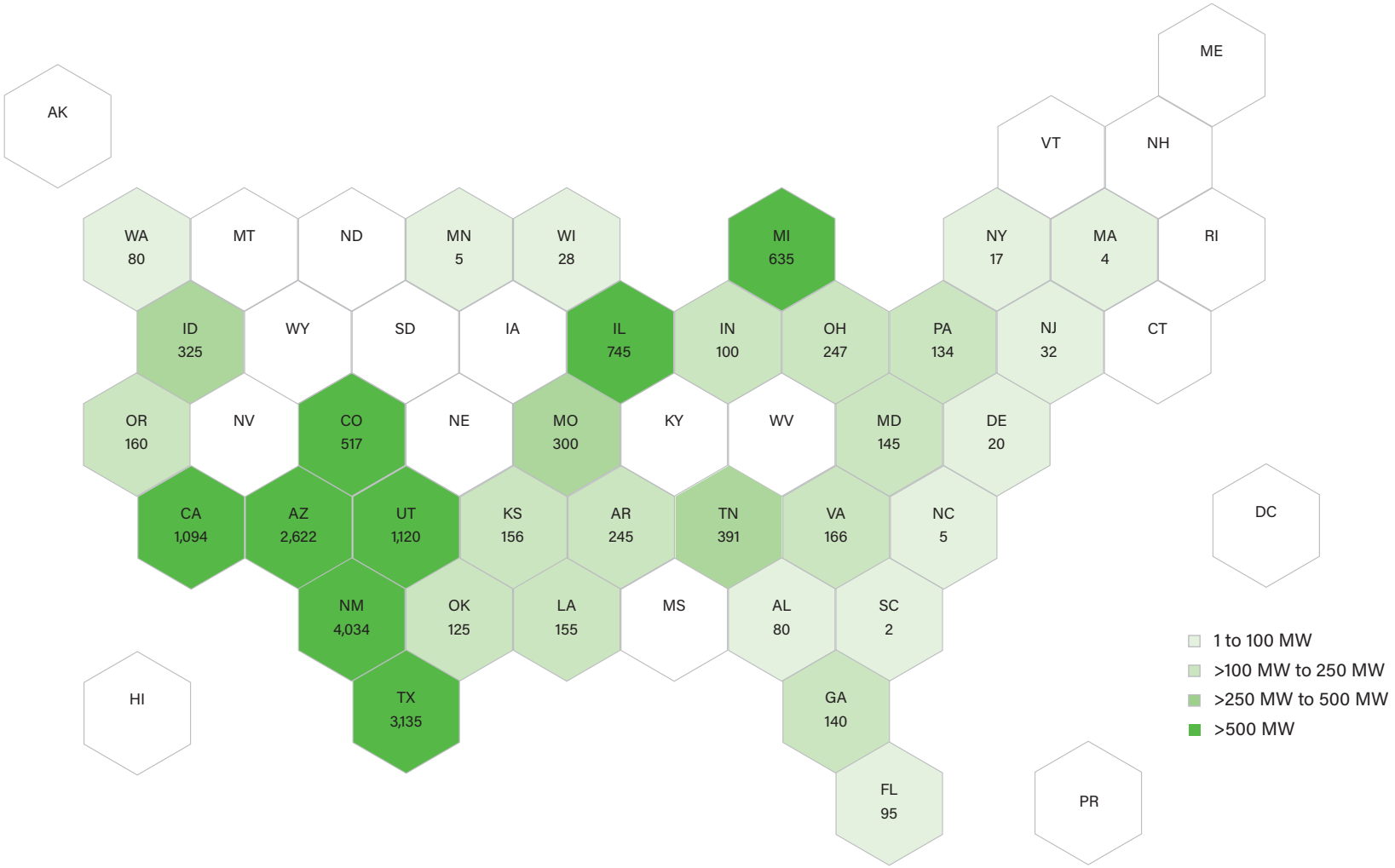
CLEAN POWER CAPACITY GROWTH

U.S. Clean Power Deployments Near 388 GW



Q2 2026 Clean Power Capacity Additions by State

Q2 2026 Clean Power Capacity Additions by State

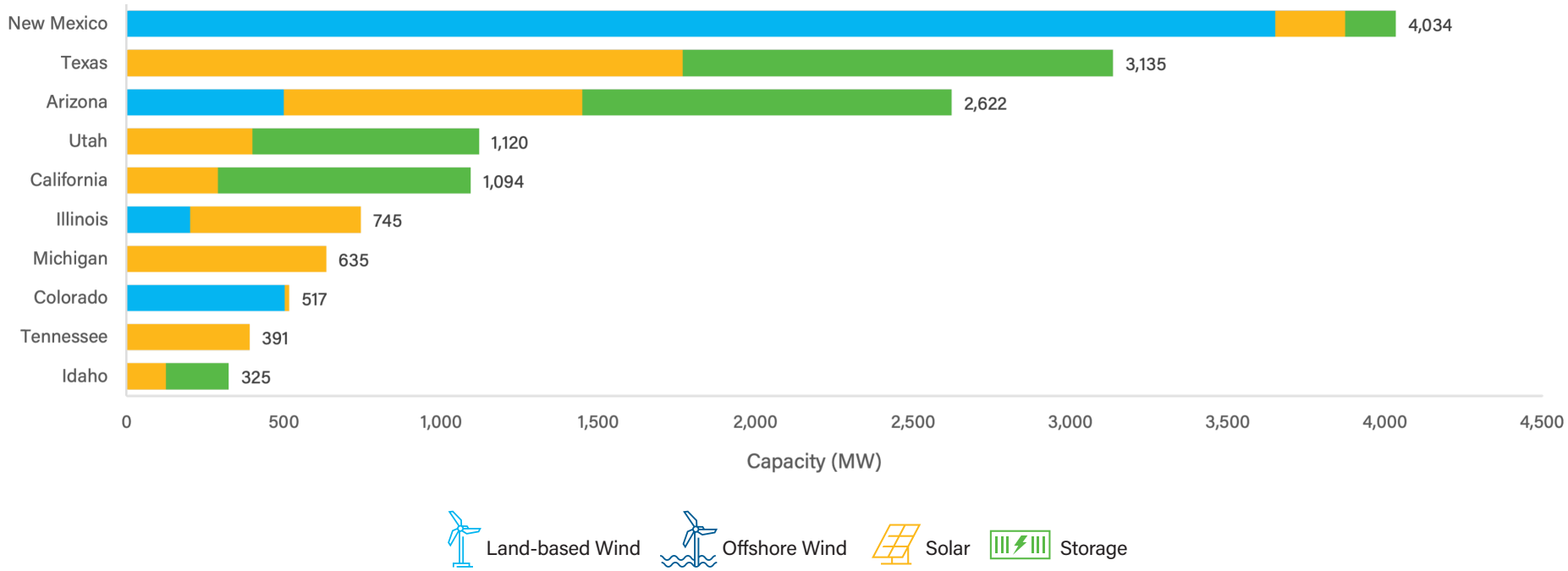


CLEAN POWER CAPACITY GROWTH

Top States for Q2 Clean Power Capacity Additions

- Thirty-three states installed new clean power projects during Q2, with 21 states bringing online more than 100 MW of capacity. By technology, all 33 states added utility-scale solar to the grid, while eleven installed a battery storage project and five installed a land-based wind project.
- With 4,034 MW of new projects starting commercial operations, New Mexico was the national leader for quarterly clean power additions and accounted for 24% of all capacity added in Q2. New Mexico brought online the 3,650 MW SunZia Wind project by Pattern Energy, making up 73% of all land-based wind added to the grid in the quarter.
- Notably, New Mexico's clean power capacity additions outpaced those in Texas by nearly 900 MW in Q2, breaking a two-and-a-half-year streak. Since Q4 2023, Texas had been the reigning champion among states for top quarterly installations.
- Among the top 10 states for quarterly installs, almost all brought online a mix of resources. Across the 33 states which commissioned capacity in Q2, 13 added more than one clean energy technology type to the grid. The remaining 19 states commissioned only utility-scale solar capacity during the quarter.

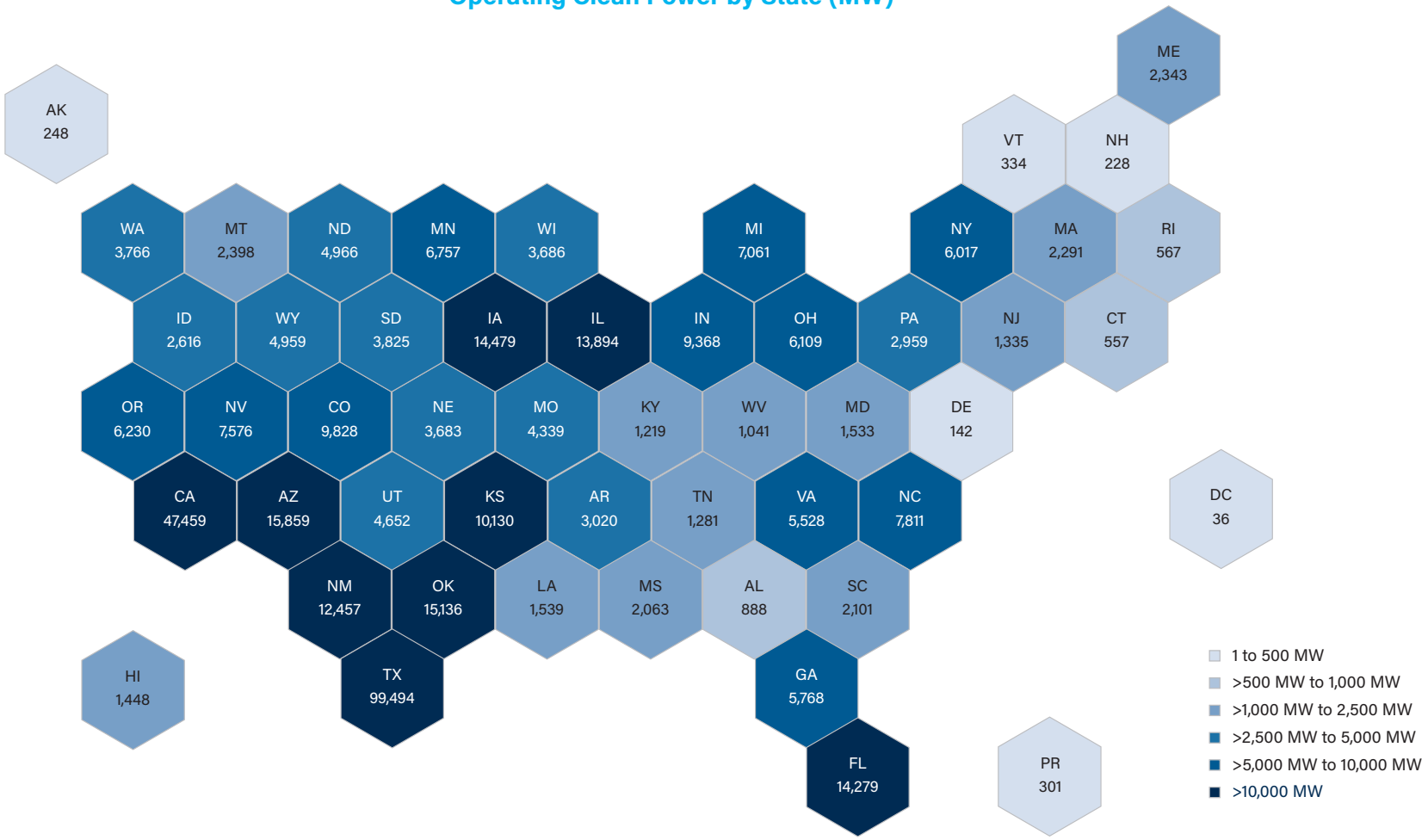
Top Ten States for Q2 2026 Clean Power Installations



Operational Clean Power Capacity

- Operational utility-scale solar, wind, and battery storage capacity is present in all U.S. states as well as D.C. and Puerto Rico, powering American homes and businesses.
- As the end of the quarter, the U.S. clean power fleet grew to reach 387,606 MW, enough to power over 83 million American homes.
- Nine states have more than 10 GW of clean power in operation, as of Q2 2026. New Mexico and Kansas broke the 10 GW milestone within the second quarter.
- With 99.5 GW of clean power projects in operation, Texas is on the verge of becoming the first state to cross the 100 GW threshold. The Lone Star State is home to 26% of online capacity in the U.S.

Operating Clean Power by State (MW)

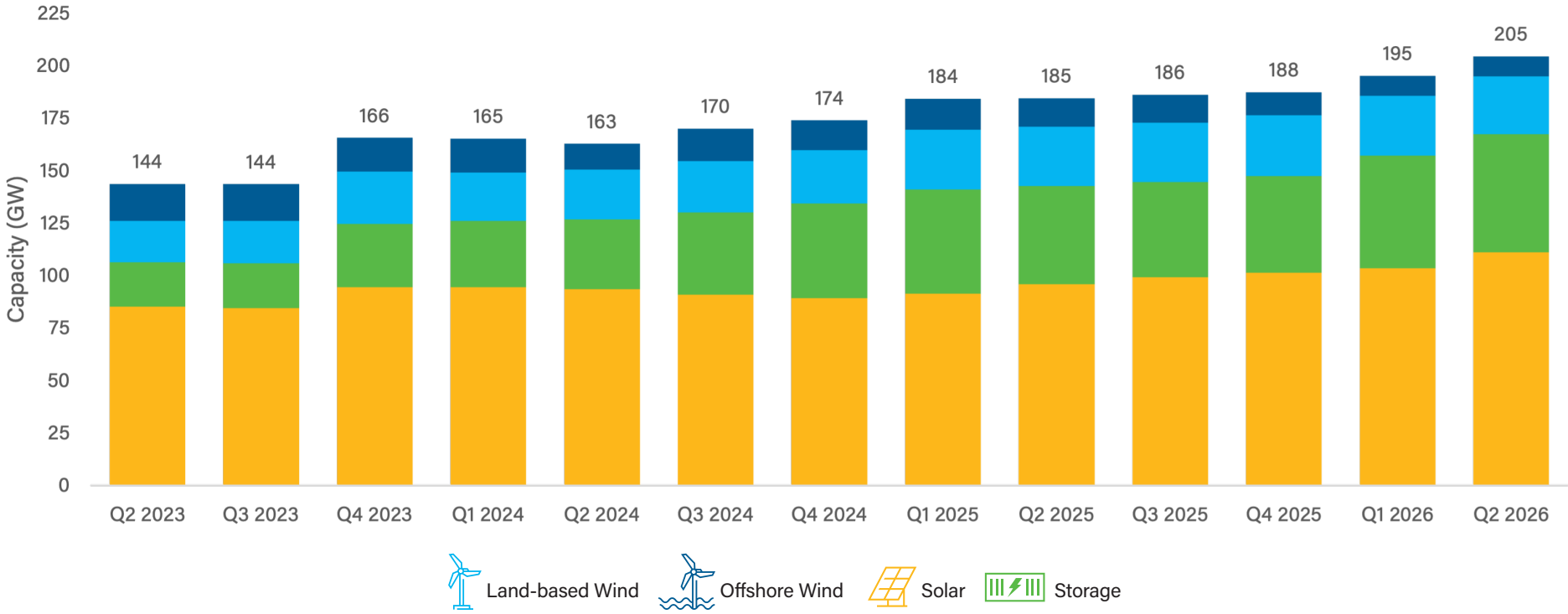


CLEAN POWER CAPACITY GROWTH

Clean Power Pipeline Over Time

- The clean power pipeline reached 204,568 MW by the end of Q2 2026, up nearly 10 GW (5%) from the previous quarter. On average, the clean power pipeline experienced a quarterly growth rate of 3% over the past two years.
- The utility-scale solar pipeline saw the strongest quarterly growth, increasing 7.7 GW, or 7%, from Q1 to a record 111 GW. This marked an acceleration for the technology, having averaged 3% growth over the previous four quarters.
- At 54% of the clean power pipeline, utility-scale solar is positioned to remain the country's leading clean power technology through the next several years. Solar projects are in development in all 50 states and Puerto Rico, with 35 states having at least 500 MW in the pipeline.
- The pipeline for battery storage grew 5% quarter-over-quarter to reach 56 GW in Q2 2026 — 21% higher than the same quarter in 2025 and a record high for the technology.
- Land-based wind pipeline additions slowed in Q2, resulting in a 4% net decrease, as the federal pause on permits from the U.S. Department of Defense obstructed early development projects without those permits from progressing to the equipment ordering and offtake agreement stages.
- The offshore wind pipeline remained unchanged from the previous quarter through the end of June 2026, with 9.6 GW of projects under construction or in advanced development.

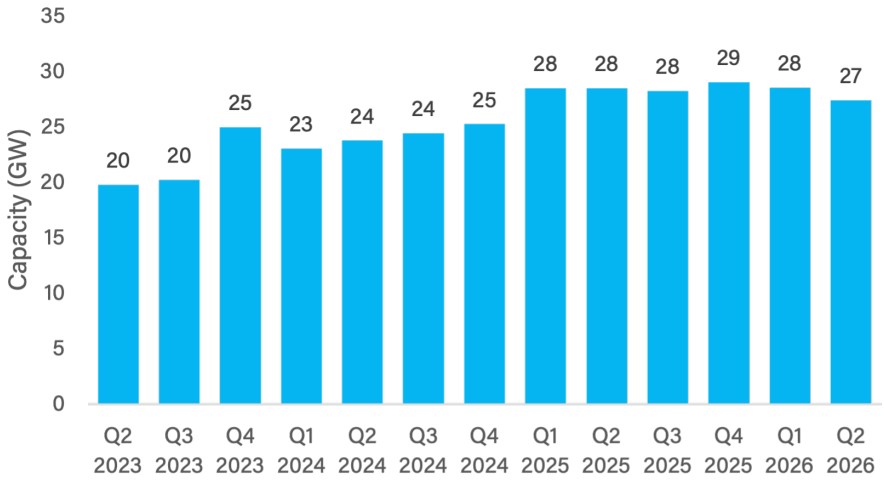
Clean Power in Development, Q2 2023 – Q2 2026



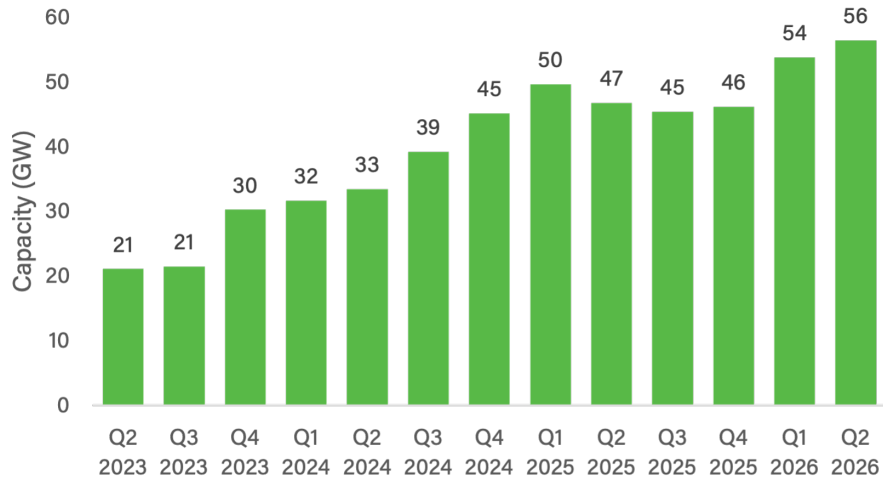
CLEAN POWER CAPACITY GROWTH

Clean Power Pipeline Over Time

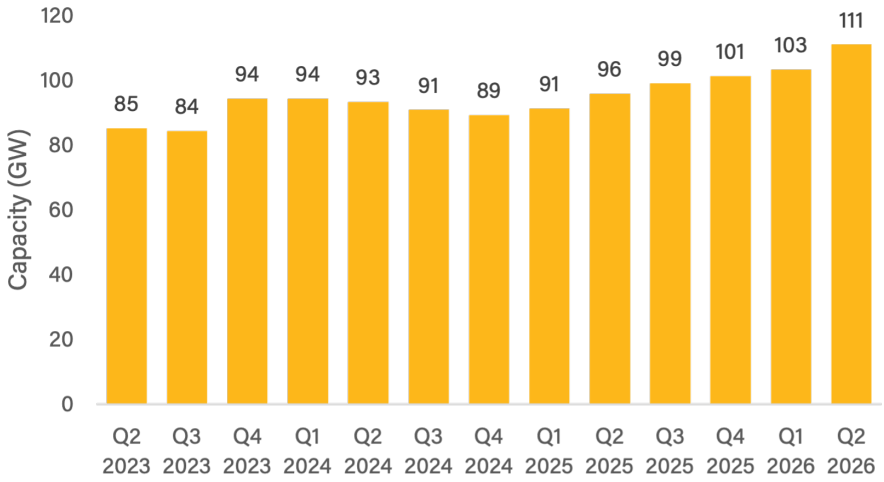
Land-Based Wind Pipeline, Q2 2023 – Q2 2026



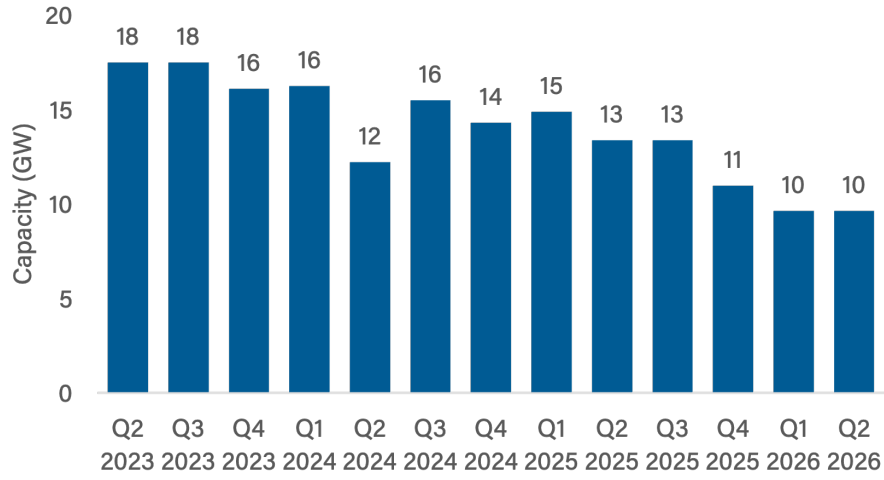
Battery Storage Pipeline, Q2 2023 – Q2 2026



Utility-Scale Solar Pipeline, Q2 2023 – Q2 2026



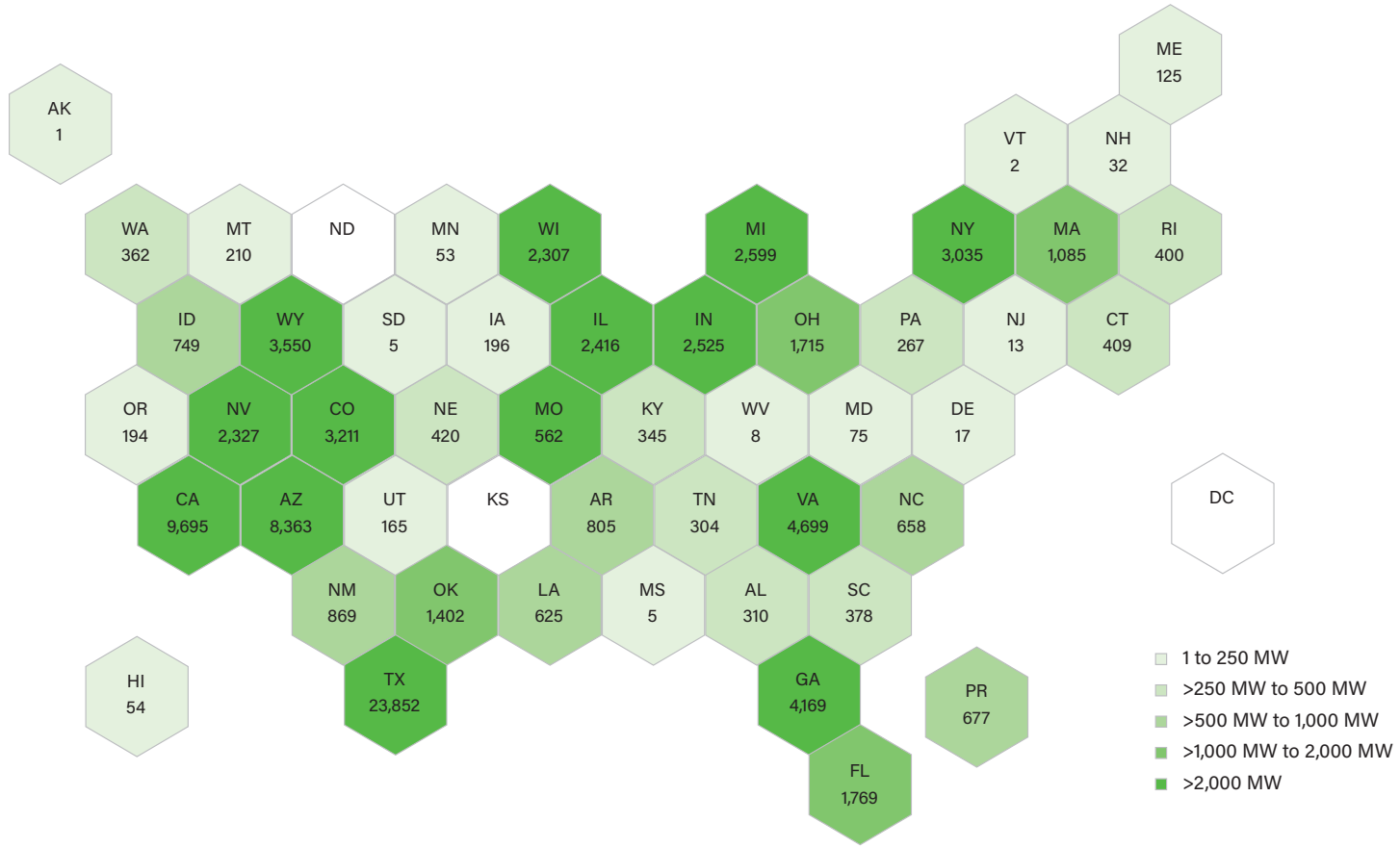
Offshore Wind Pipeline, Q2 2023 – Q2 2026



Clean Power Construction Activity

- One-hundred and thirty clean power projects started construction in Q2 2026, totaling nearly 14 GW of capacity across 26 states. Utility-scale solar projects accounted for just over half of the new construction, followed by battery storage at 35% and land-based wind at 13%.
- The states that saw the most new construction in the second quarter included Texas (4.8 GW), Georgia (3.1 GW), California (1.2 GW), Virginia (1.0 GW), and Michigan (0.6 GW).
- By the end of June 2026, 614 projects (88,009 MW) had reached the construction phase of project development. Forty-eight states and Puerto Rico had at least one project under construction.
- Seventeen states had at least 1 GW of clean power capacity under construction. Three states had more than 5 GW: Texas, California, and Arizona. Texas had the most capacity under construction for utility-scale solar, land-based wind, and battery storage, while Virginia had the most for offshore wind.

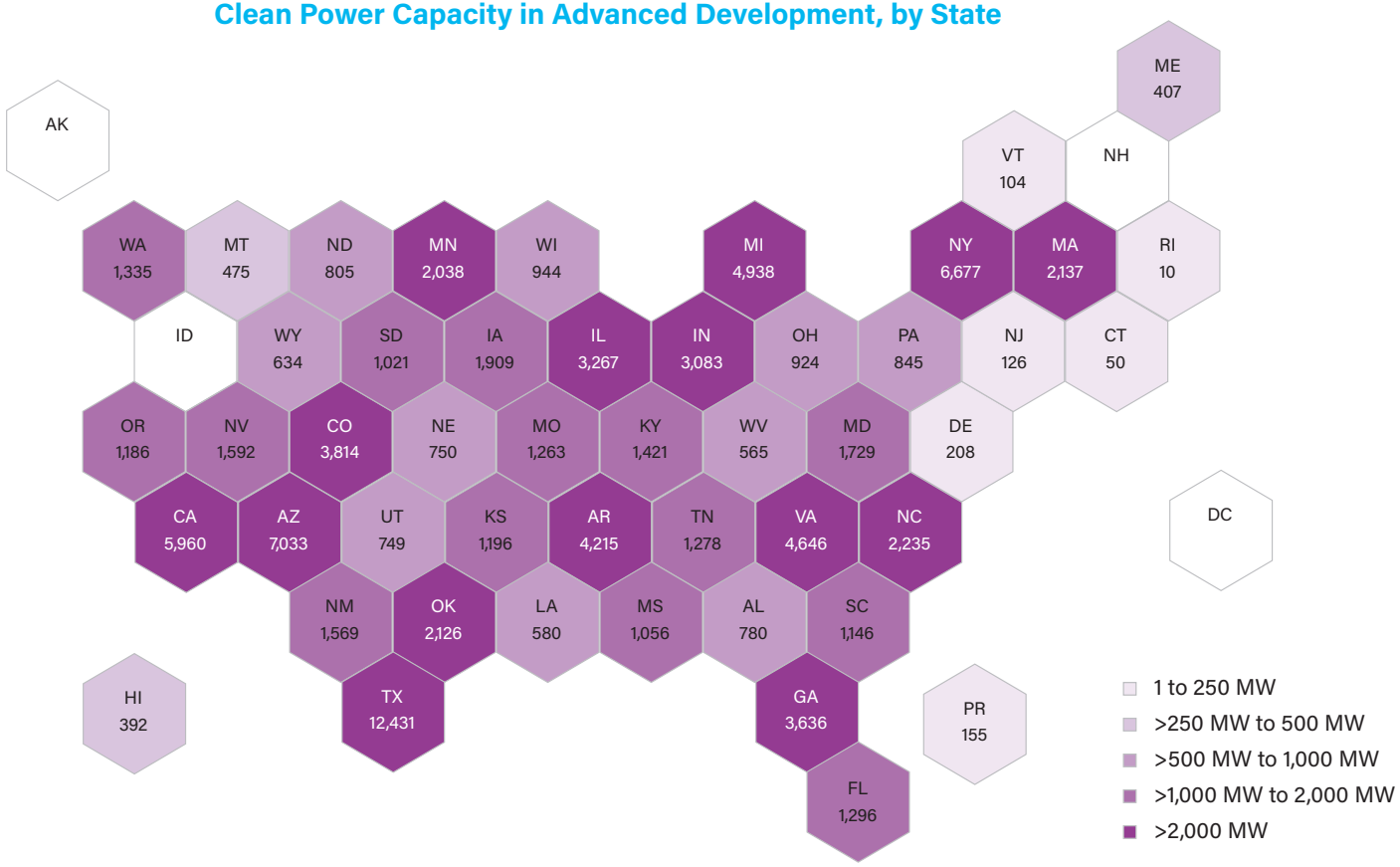
Clean Power Capacity Under Construction, by State



Clean Power Advanced Development Activity

- At the end of the second quarter, 116,558 MW of project capacity was reported to be in advanced development, spanning 47 states and Puerto Rico. Twenty-nine states had more than 1 GW of projects in advanced development.
- At 12.4 GW, Texas was the only state to have more than 10 GW of advanced development projects. Arizona (7 GW), New York (6.7 GW), and California (6 GW) were the only other states to have over 5 GW of advanced development projects.
- By technology, Texas was the top state for solar (7.6 GW) and land-based wind (2.3 GW) capacity in advanced development. California ranked first for battery storage (4.1 GW).
- Accounting for 59%, utility-scale solar continued to make up the bulk of the advanced development pipeline. Battery storage accounted for 26%, while land-based wind and offshore wind were steady at 12% and 4%, respectively.

Clean Power Capacity in Advanced Development, by State



Offshore wind capacity is attributed to states based on the state that awarded ORECs or PPAs to the projects.

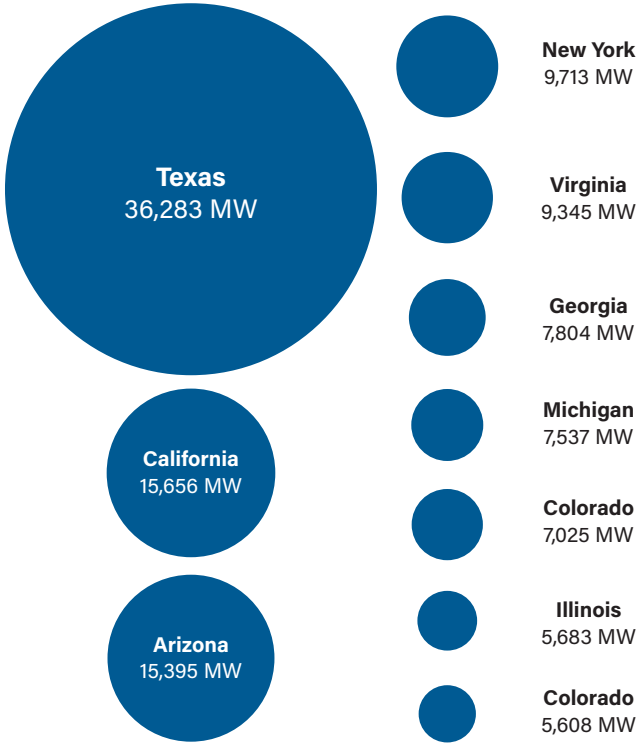
ACP defines advanced development as projects not under construction, but with a PPA, firm equipment order, or moving forward with plans to be placed under utility ownership as of the end of that quarter.

CLEAN POWER CAPACITY GROWTH

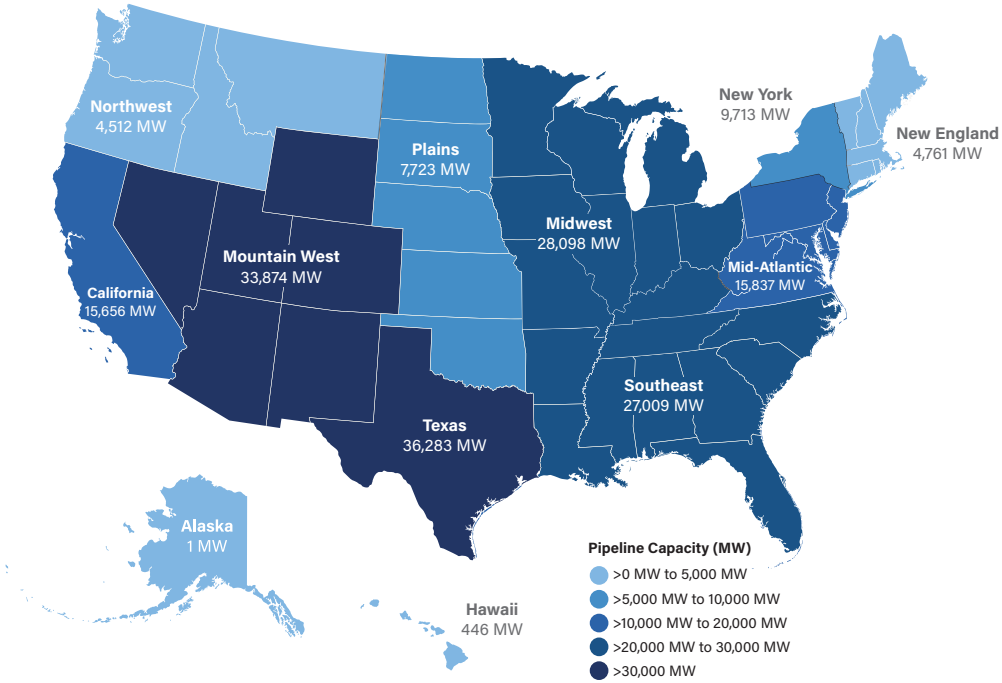
Clean Power Pipeline by State and Region

- Across all 50 states and Puerto Rico, the clean power project pipeline rose to 204,568 MW at the end of H1 2026.
- The number of states with over 1 GW of clean power capacity in the pipeline rose to 36 states, up from 33 in the previous quarter after Alabama, Mississippi, and South Dakota added enough new clean power capacity to their pipelines to cross that 1 GW threshold.
- The top ten states for clean power in development remains regionally diverse, featuring states in the Mountain West, Midwest, Southeast, Mid-Atlantic, as well as the state-regions Texas, California, and New York.
- Regionally, Texas overtook the Mountain West for top region for clean power development in Q2, after New Mexico, Arizona, and Utah each deployed enough new clean power to make the quarter's top five list for quarterly installations.

Top States, Clean Power Development Capacity

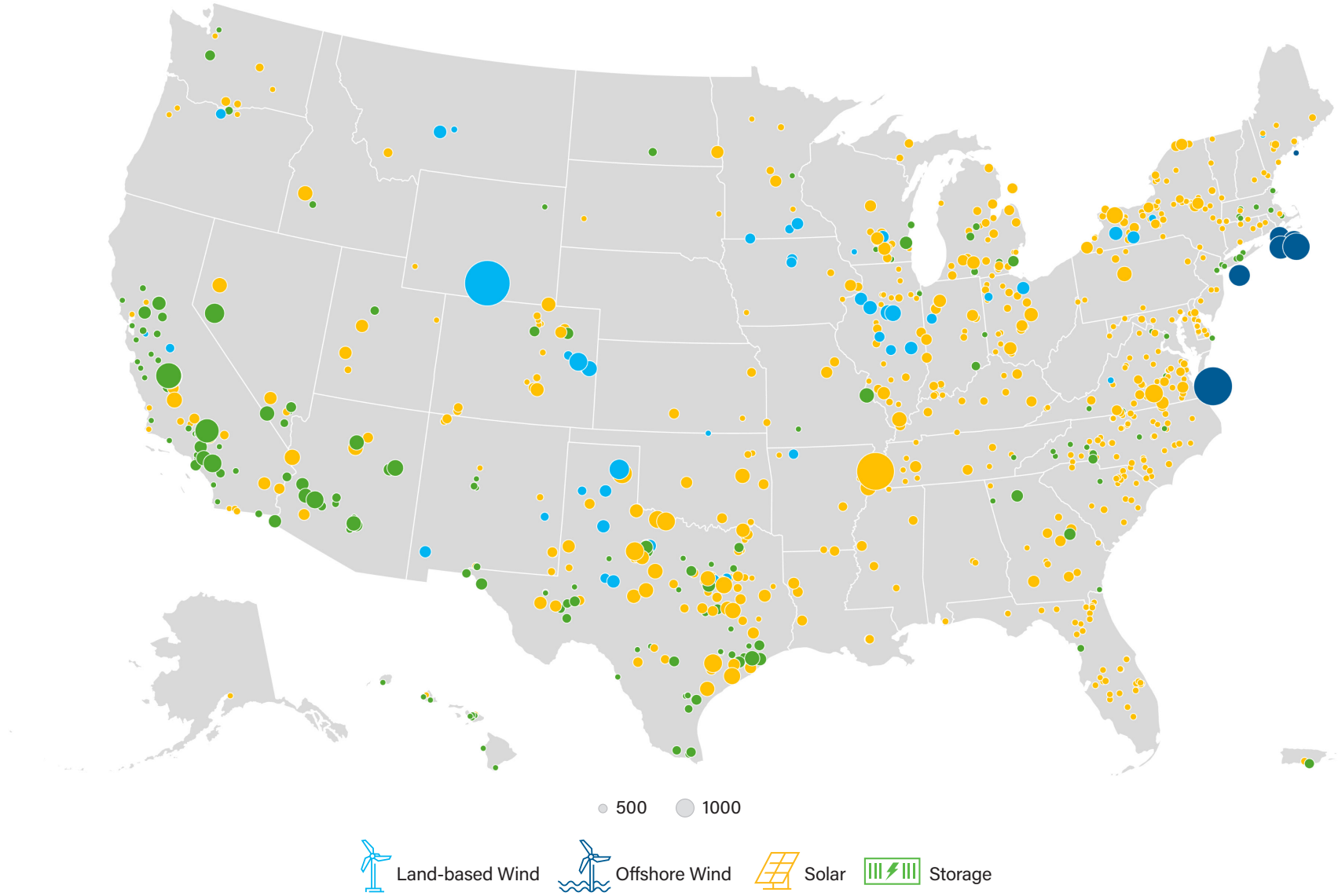


Clean Power Development Capacity by Region



CLEAN POWER CAPACITY GROWTH

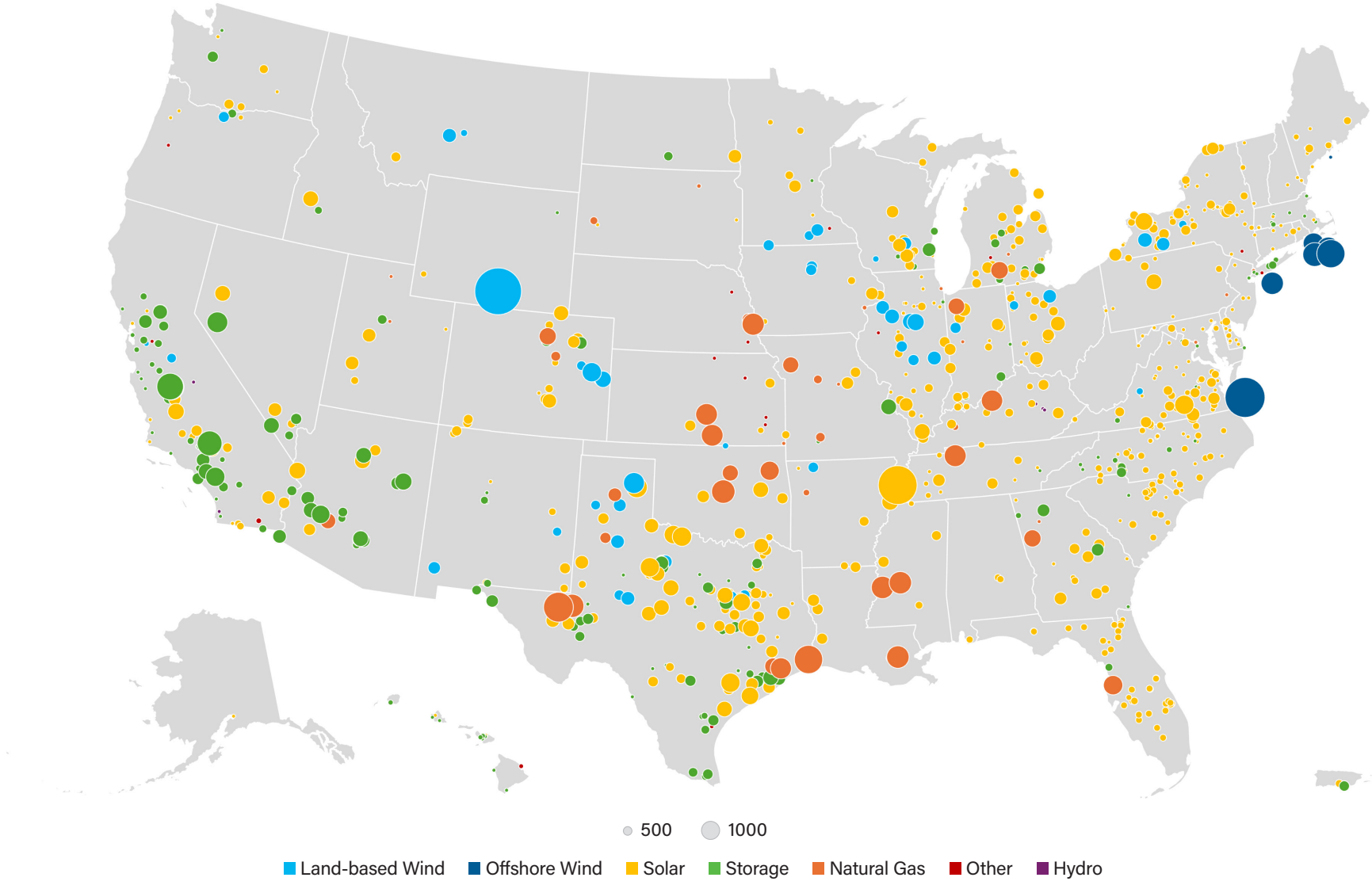
Projects in the Pipeline



Map displays projects only where exact location information (latitude and longitude) is known.

CLEAN POWER CAPACITY GROWTH

Projects in the Pipeline, All Technologies

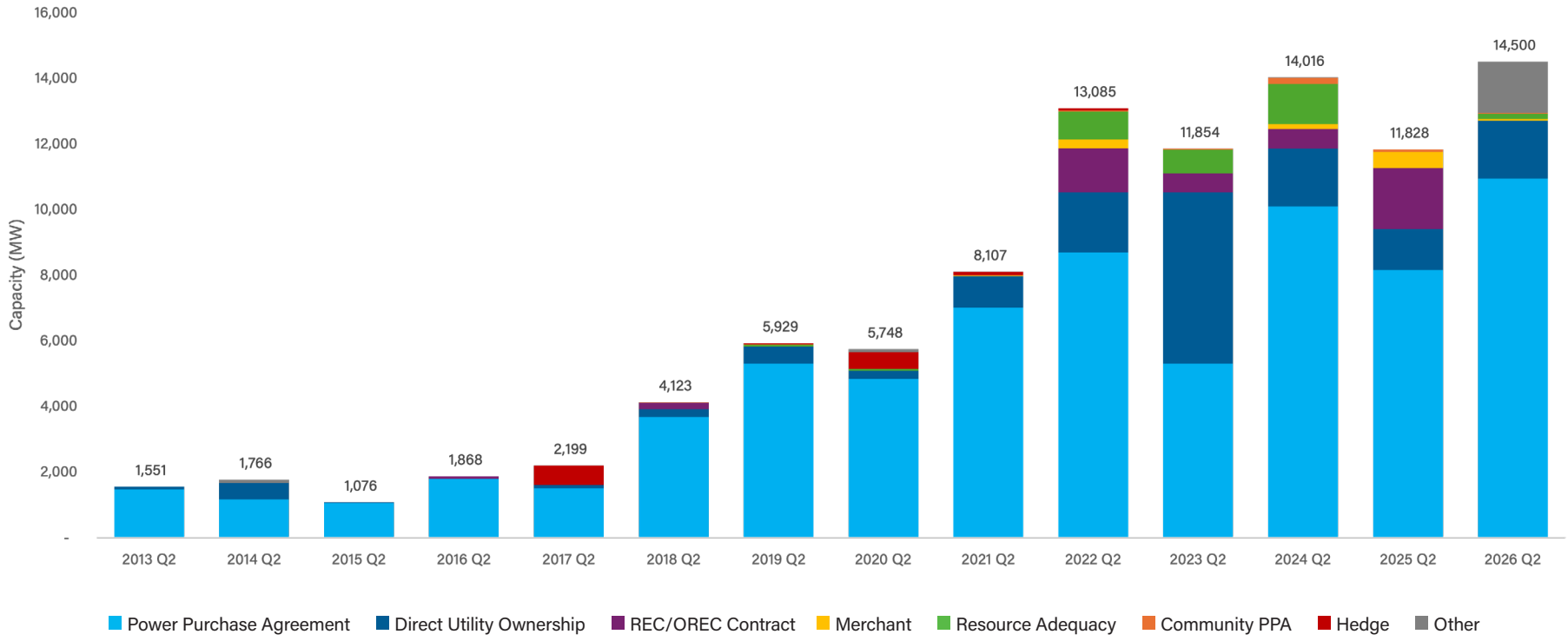


Map displays projects only where exact location information (latitude and longitude) is known.
Map only includes facilities that have received regulatory approval or are under construction
Source: EIA 860 June 2026

Offtake Announcements Over Time

- Clean power purchasers announced 14.5 GW of offtake arrangements throughout the second quarter of 2026, roughly 2.7 GW more than the second quarter of 2025. Year-over-year, total offtake announcements grew by 23%.
- PPAs remained the leading offtake mechanism, accounting for 75% of all Q2 announcements. Contracted capacity reached 10.9 GW, a 34% year-over-year increase and a record high for Q2 PPA announcements.
- Developers and utilities contracted 1.8 GW of direct-use offtake agreements in Q2 2026, a 42% increase year-over-year. Direct-use from utilities accounted for 12% of all offtake announced.
- Other offtake arrangements made up just over 12% of announcements for the quarter. Google's non-utility, direct offtake announcement of the Meitner Solar and Wind Project made up the bulk of the Other category.
- The largest offtake announcement this quarter was between Cypress Creek Renewables and Google. A virtual PPA was signed for Steel River Solar 1 & 2 and Steel River BESS 1 & 2, totaling 1,630 MWdc of solar and 480 MWdc/1,920 MWhdc of storage. Once operational, Steel River Energy will be the largest solar and storage project in Arkansas.

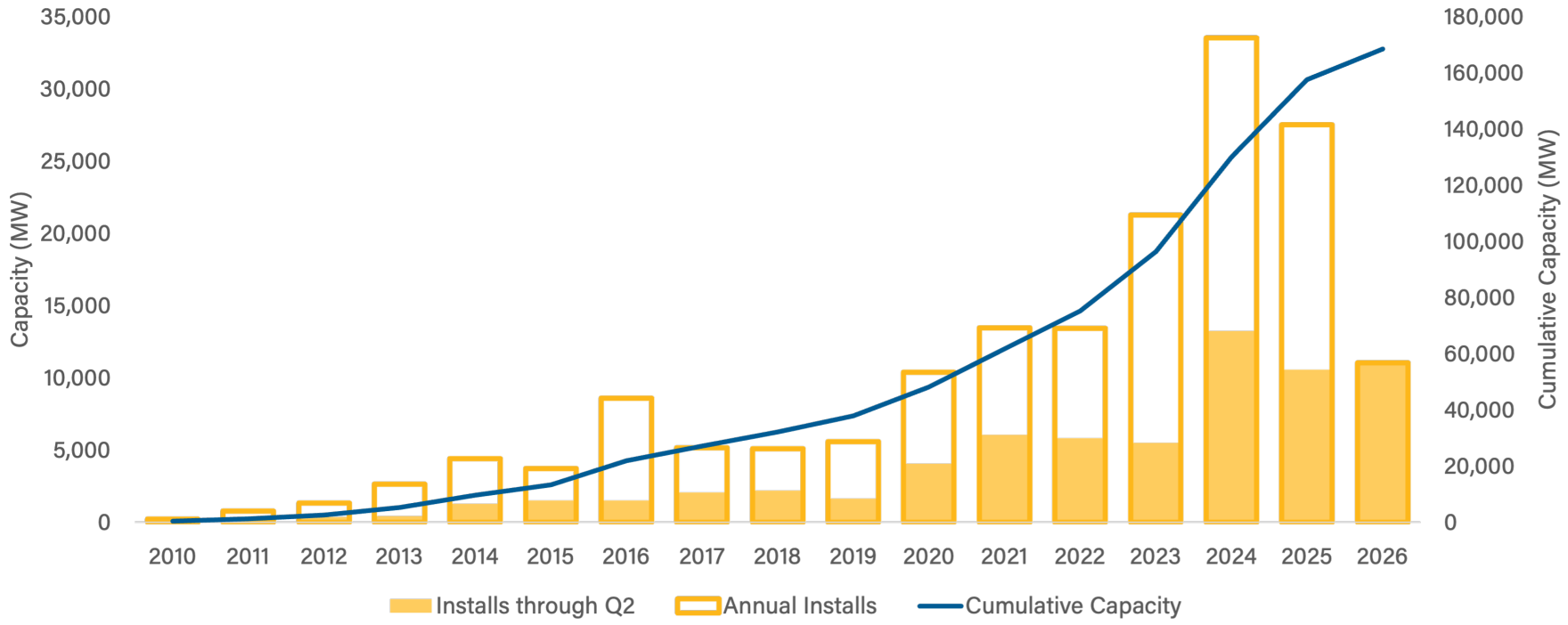
Q2 Clean Power Offtake Announcements Over Time



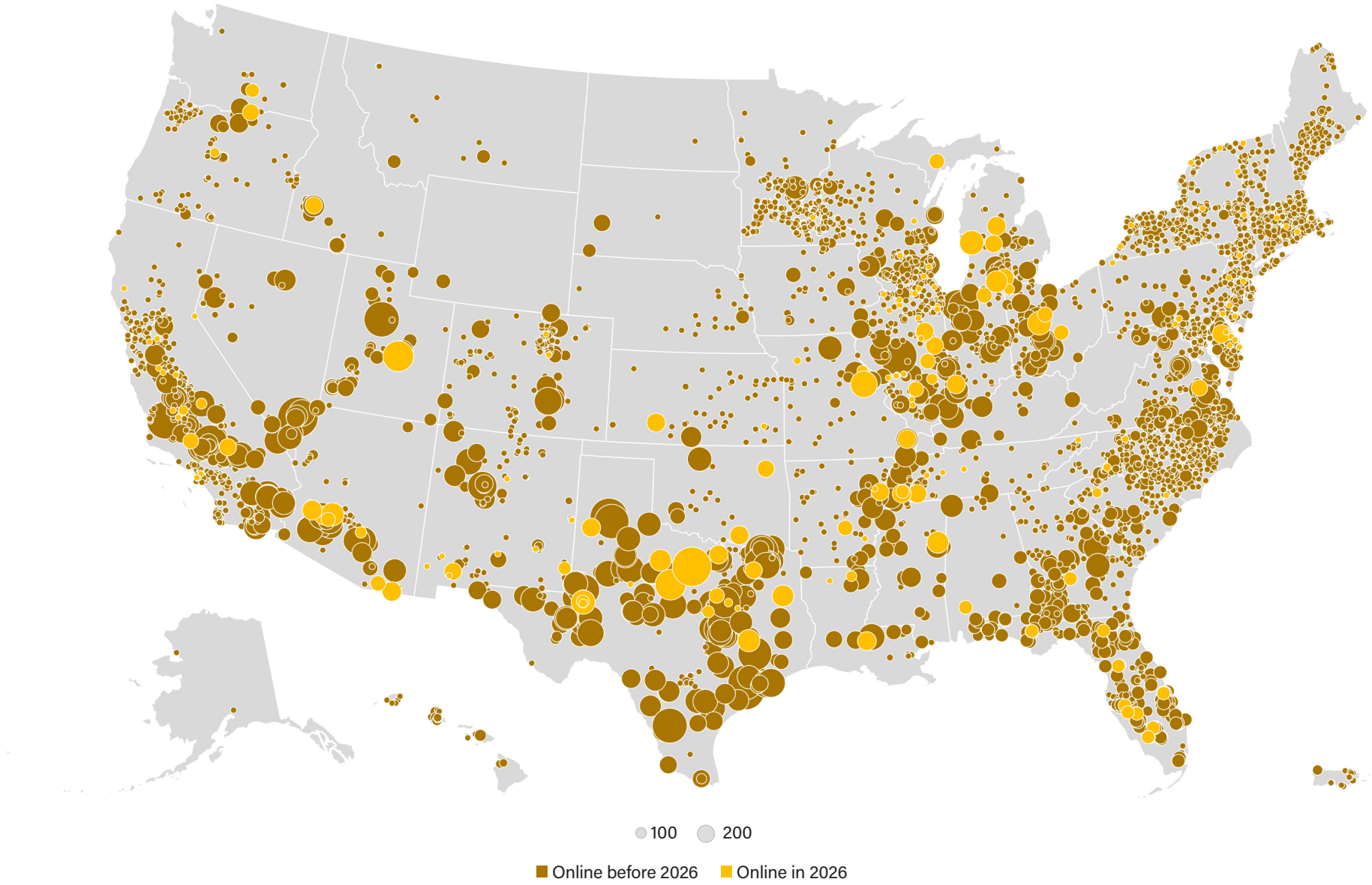
Q2 2026 Utility-Scale Solar Deployments

- U.S. developers added 7,405 MW of utility-scale solar capacity to the grid in Q2, marking the strongest Q2 on record for solar installations. Quarter-over-quarter, solar additions more than doubled, rising 102%. Year-over-year, additions grew 27%.
- Utility-scale solar is operational in all 50 states, D.C., and Puerto Rico. Developers have commissioned more than 1 GW of utility-scale solar capacity in 30 states.
- The largest utility-scale solar project phase energized in Q2 2026 was Repsol S.A.'s 650 MW Pinnington Solar (Longhorn) project in Jack County, Texas. Pinnington is the largest solar phase in operation in Texas and the second-largest solar phase in operation in the nation.
- At the end of Q2 2026, cumulative operational solar capacity in the U.S. reached 168,599 MW, enough to power nearly 35 million U.S. homes.

U.S. Annual and Cumulative Utility-Scale Solar Capacity Growth



Geography of Utility-Scale Solar

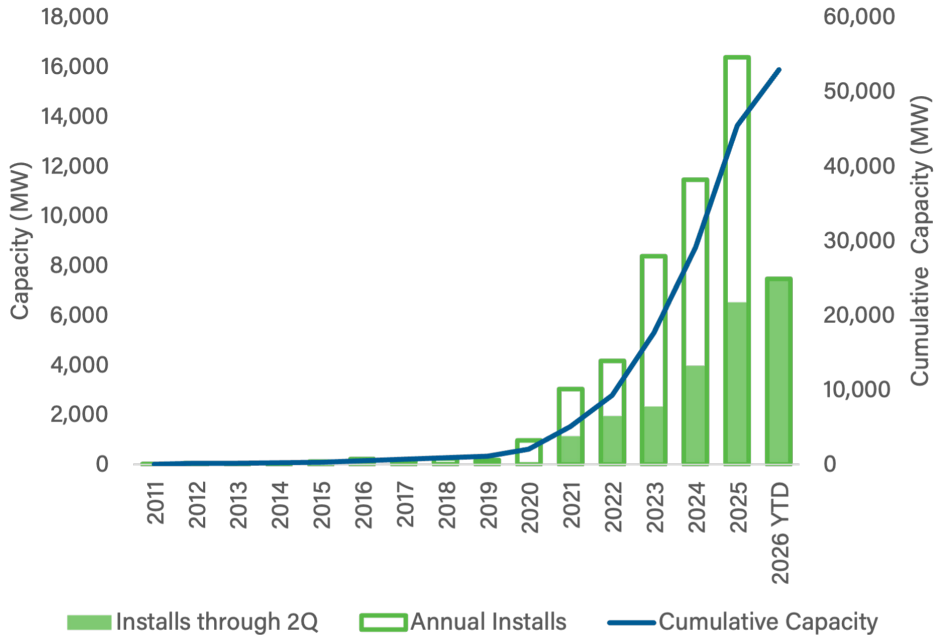


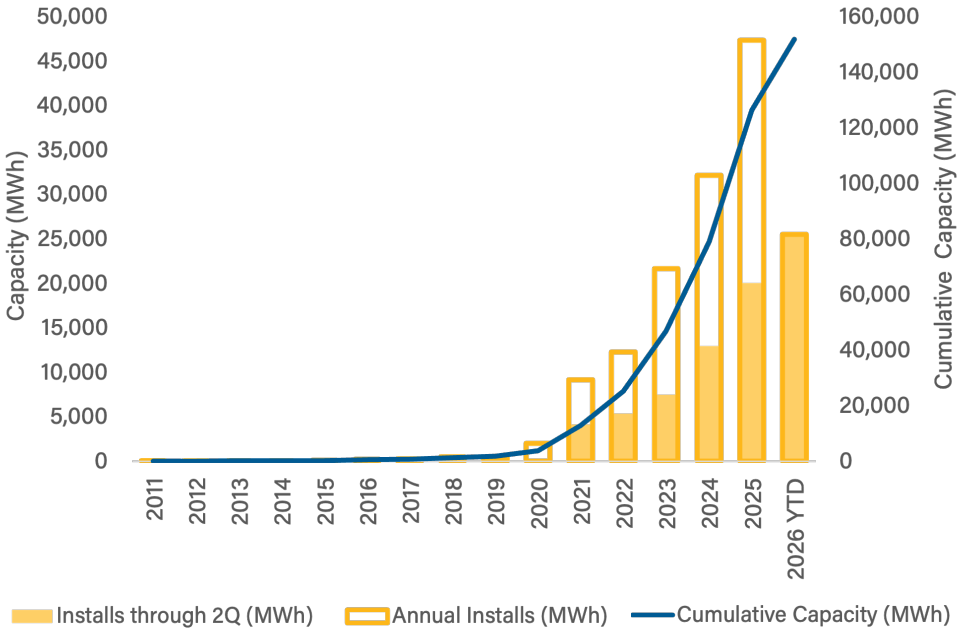
Map displays projects only where exact location information (latitude and longitude) is known.

Q2 2026 Energy Storage Installations

- Developers commissioned 50 new utility-scale battery storage projects in the first quarter, adding 4,685 MW/17,177 MWh of new capacity to the grid, bringing cumulative capacity to 52,945 MW/152,733 MWh.
- H1 2026 was the strongest first half for battery storage additions, with over 14% more capacity added during Q1 and Q2 compared to H1 2025, the previous record for installations in the first half of the year.
- Battery storage accounted for 27% of all clean power capacity additions in Q2 2026.
- At the end of Q2 2026, there was 23,590 MW of storage capacity under construction and 32,826 MW in advanced development for a total pipeline capacity of 56,416 MW. The storage pipeline has grown by 21% since Q2 2025.

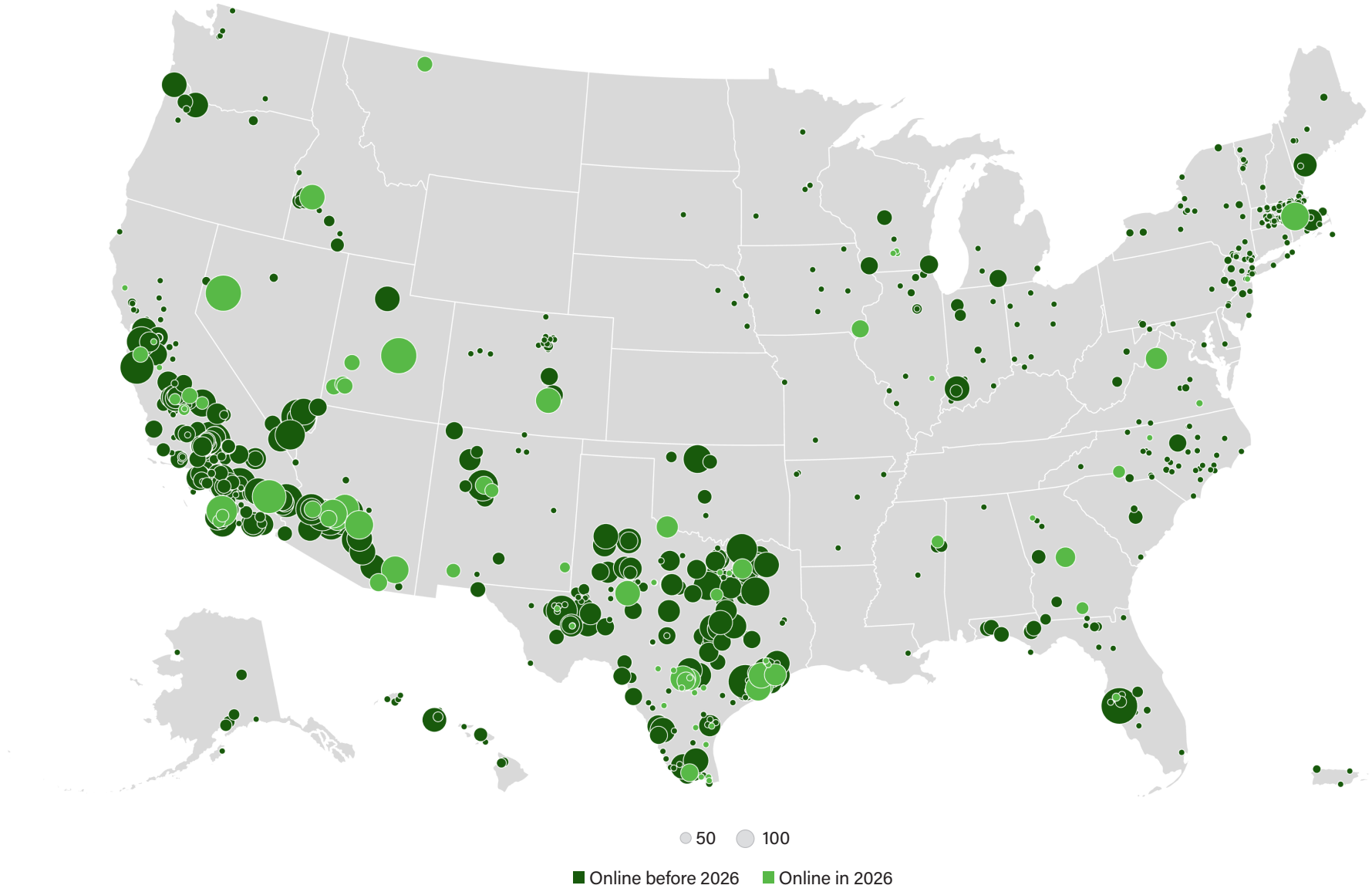
U.S. Annual and Cumulative Battery Storage Capacity Growth





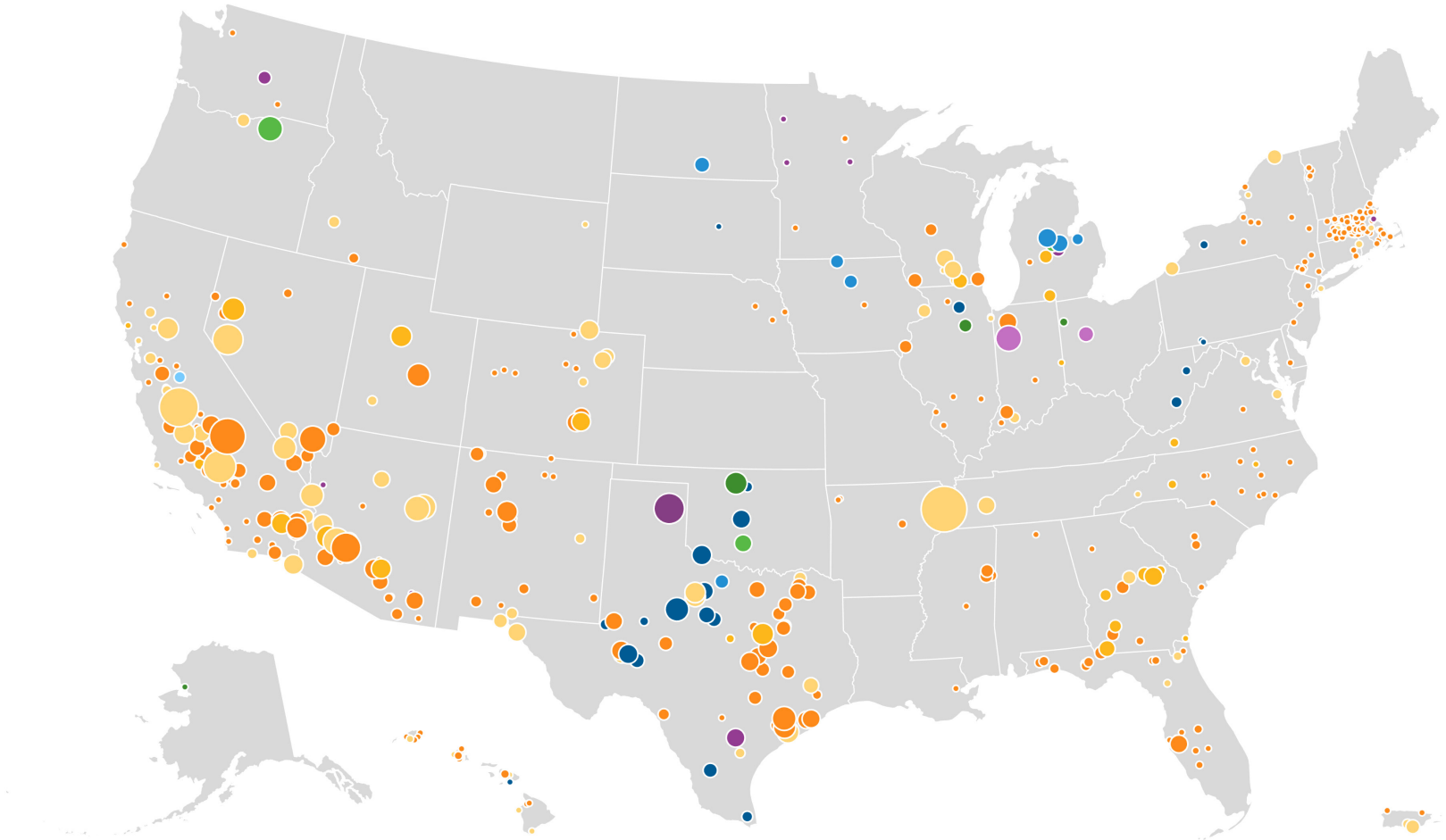
Note: Battery storage capacity is tracked in terms of rated power capacity (MW), the maximum possible instantaneous discharge, and energy capacity (MWh), the maximum amount of stored energy.

Geography of Energy Storage



Map displays projects only where exact location information (latitude and longitude) is known.

Geography of Hybrid Projects



Capacity
- 50 MW
- 100 MW

Solar + Storage
- Online
- Partially Online
- Pipeline

Wind + Solar
- Online
- Partially Online
- Pipeline

Wind + Storage
- Online
- Partially Online
- Pipeline

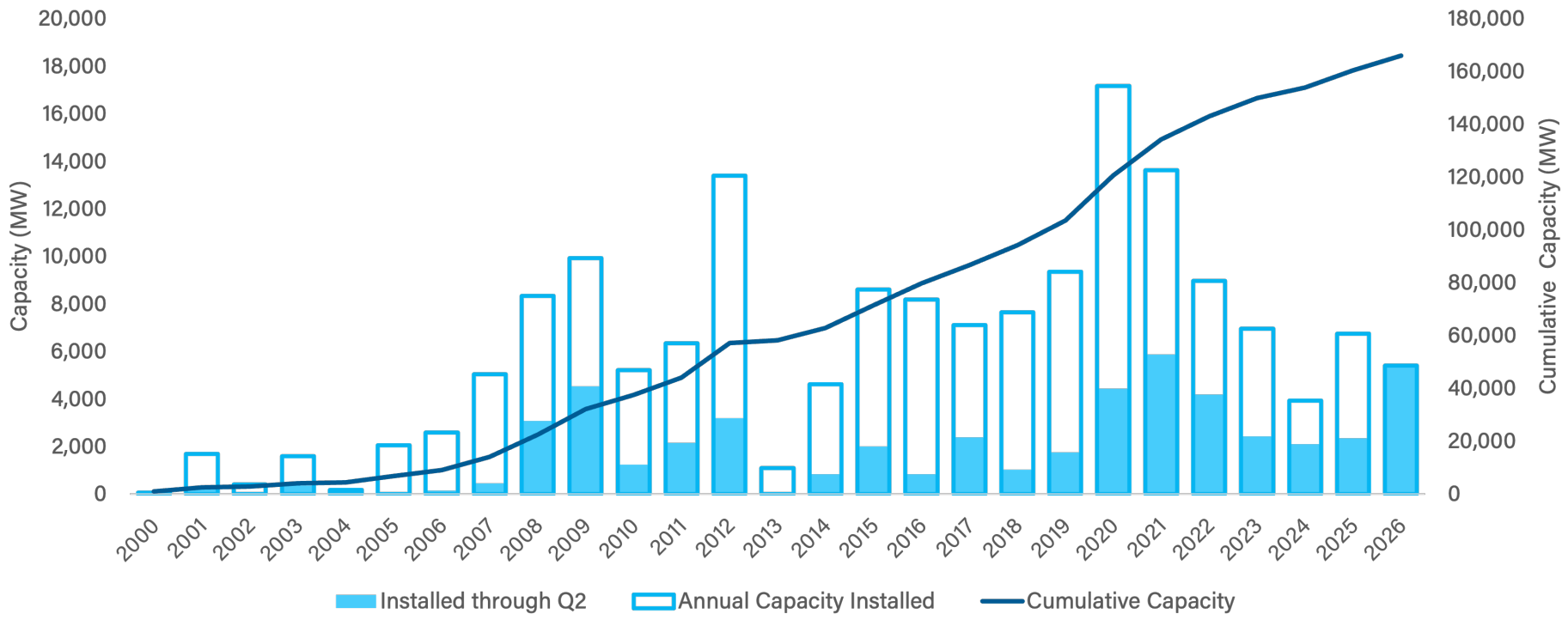
Wind + Solar + Storage
- Online
- Partially Online
- Pipeline

Note: The pipeline consists of projects fully in development and not yet operating phases of partially online projects. Map displays projects only where exact location information (latitude and longitude) is known.

Q2 2026 Land-Based Wind Installations

- Project developers dedicated five greenfield land-based wind projects during Q2 2026, adding 4,969 MW of new capacity to the grid. At the close of the quarter, the U.S. land-based wind fleet had grown to 165,888 MW.
- The nearly 5 GW of new capacity installed makes Q2 2026 the best second quarter for wind installations in history. Year-to-date, developers have brought online 5,383 MW of new capacity, already exceeding the recent-low year of 2024. The industry is on track to surpass the total amount of capacity installed in 2023 and 2025 by the end of the year.
- The record-breaking quarter can be attributed to Pattern Energy's massive SunZia Wind project. At 3,650 MW, SunZia was responsible for 73% of capacity installed during the quarter and 68% of capacity installed so far in 2026.
- SunZia is the largest land-based wind project ever built in the U.S. Consisting of 916 turbines and over 550 miles of HVDC transmission lines, the project will deliver wind power from Torrance, Lincoln, and San Miguel Counties in New Mexico to Arizona, where it connects to the CAISO grid. Numerous utilities have signed on as power purchasers, including the Salt River Project and community choice aggregators serving California.

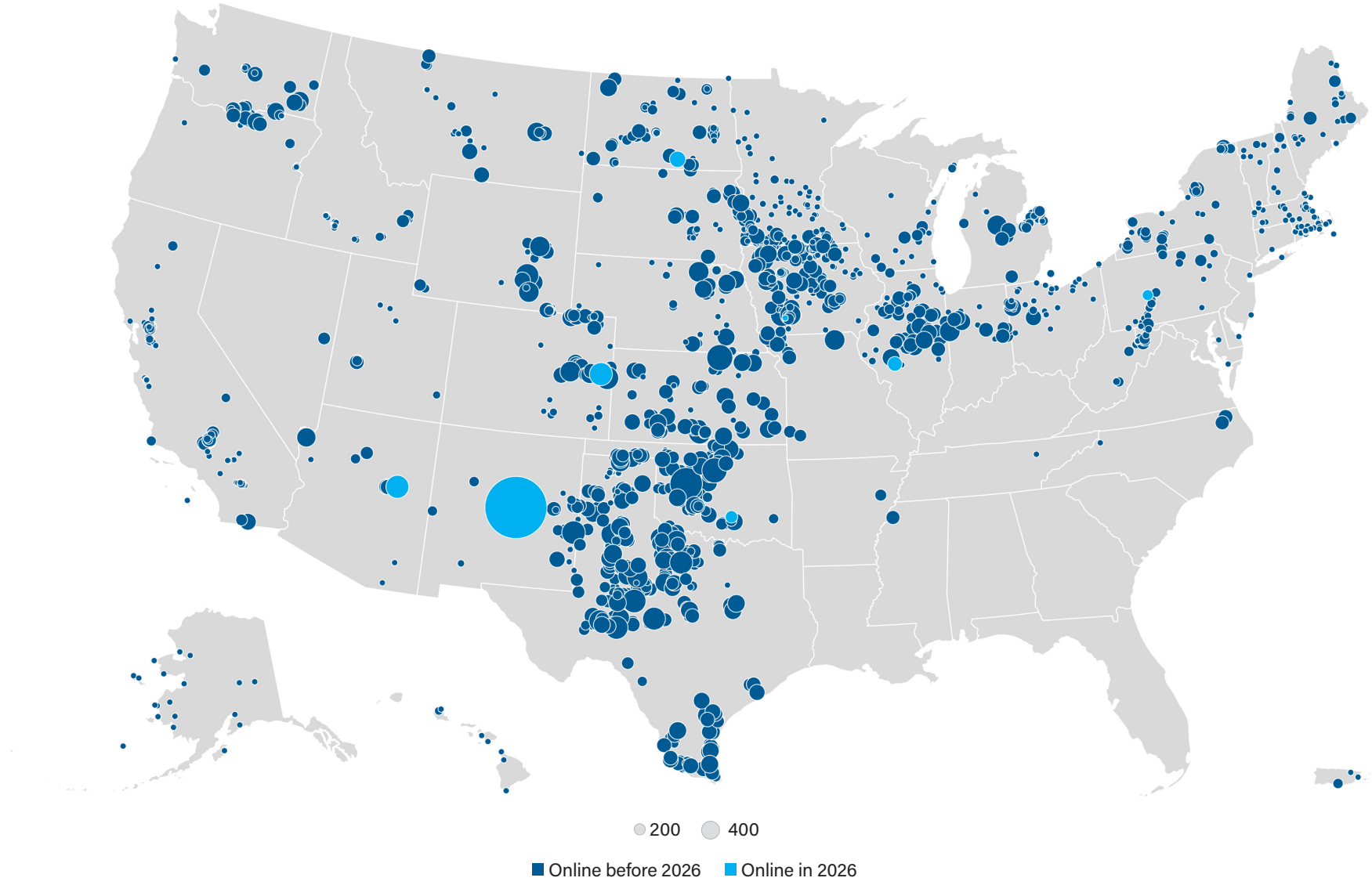
U.S. Annual and Cumulative Land-Based Wind Capacity Growth



Note: ACP is aware of additional repowering project activity in 2025. Because project details could not be confirmed, these projects are excluded from report data.

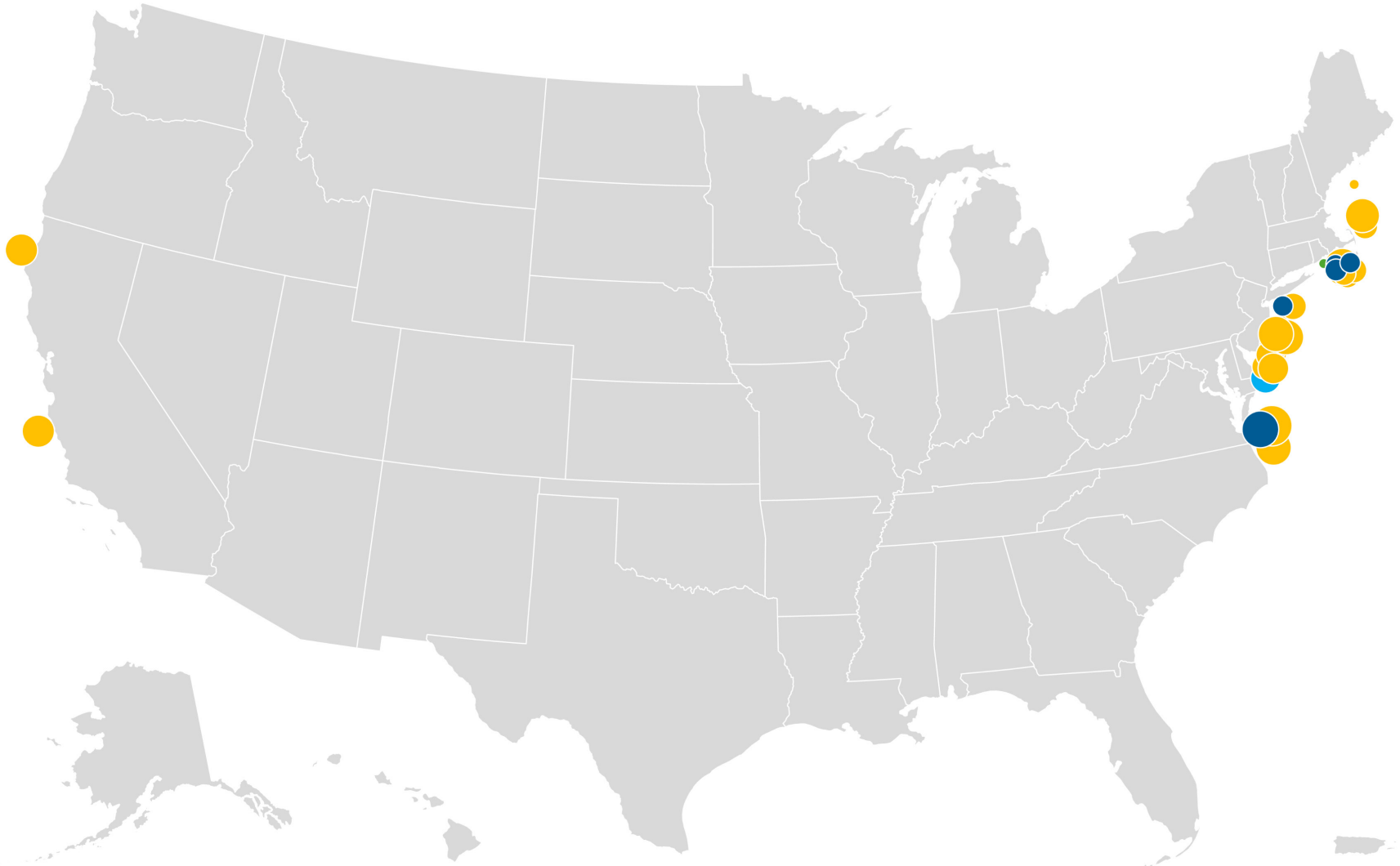
LAND-BASED WIND ACTIVITY

Geography of Land-Based Wind



OFFSHORE WIND ACTIVITY

Geography of Offshore Wind



Map denotes projects as of the end of Q2 2026. As such, it includes Bluepoint Wind and Golden State Wind as Early Development projects. On April 27, 2026, Ocean Winds reached an agreement with DOI to relinquish the Bluepoint and Golden State offshore lease areas.

The American Clean Power Association (ACP) is the leading voice of today's multi-tech clean energy industry, representing energy storage, wind, utility-scale solar, clean hydrogen, and transmission companies. ACP is committed to meeting America's energy and national security goals and building our economy with fast-growing, low-cost, and reliable domestic power.

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