

US Wind Energy Monitor

Q3 2026

Joint report from Wood Mackenzie and the
American Clean Power Association





About this report

The **US Wind Energy Monitor** is a quarterly publication produced by **Wood Mackenzie Power & Renewables**. Drawing on the latest industry data, the report provides timely and comprehensive analysis of the market dynamics shaping the US onshore and offshore wind sectors. This **Q3 2026 edition** reviews developments from Q2 2026 and includes a five-year outlook covering expected capacity additions, costs, supply chain trends, policy developments, and investment activity.

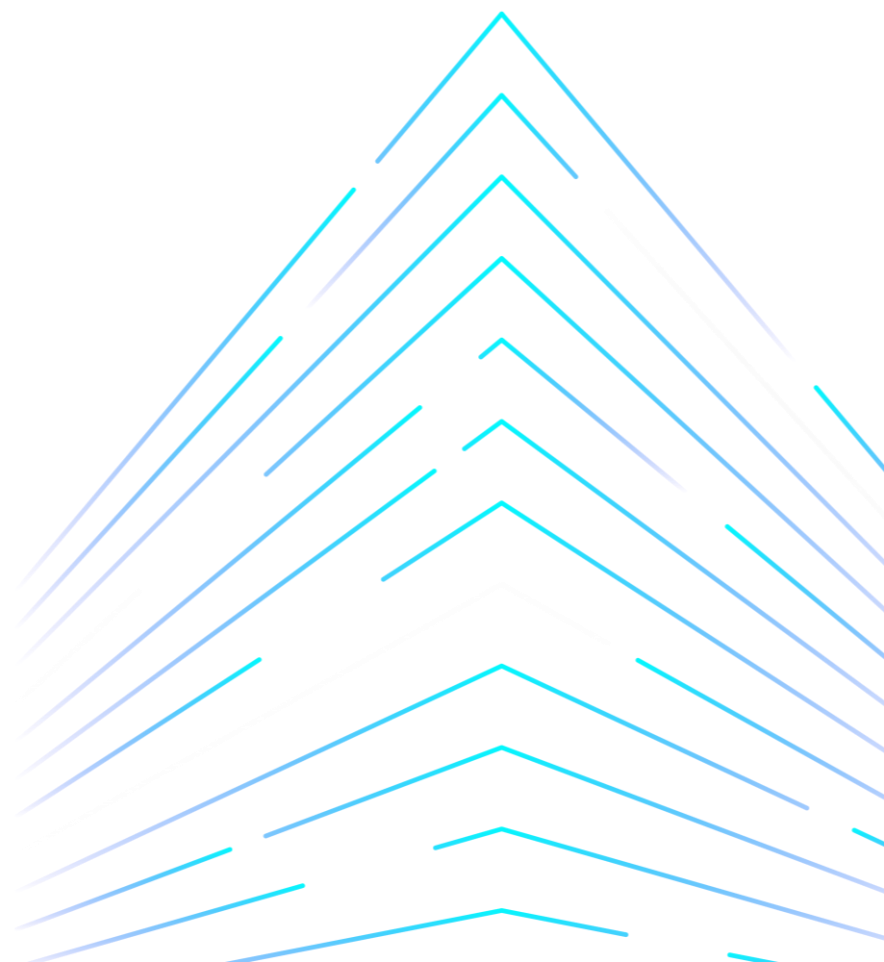
Notes

- All forecasts and forward-looking projections are developed by Wood Mackenzie Power & Renewables
- Media inquiries should be directed to Mark Thomson (Mark.Thompton@woodmac.com) from Wood Mackenzie.



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Executive summary





Five-year outlook is stable as order intake and offshore execution advances

Q2 activity

Turbine orders surged to 2.8 GW in Q2, the highest since Q4 2023, as developers sought to meet tax credit qualification deadlines. SunZia (3.65 GW) came online as the largest wind project ever built in the US, sending New Mexico to the top of 2026 capacity additions. In the offshore sector, Ørsted pressed ahead by testing Revolution Wind and advancing foundation work at Sunrise Wind. The announcement of relinquished offshore leases continued, with RWE's exit representing the largest to date (US\$1.22 billion), pushing aggregate federal buyouts in the US to nearly US\$4 billion.

Outlook

The US wind industry remains on course to add 39 GW of onshore new-build capacity by 2030. More than half of the project pipeline from 2026 to 2028 is already operating or under construction, limiting near-term risk. Offshore holds at 5 GW, all of it delivering within the next two years as unfavorable policy limits new developments. The repower forecast pulled back 1 GW quarter-on-quarter due to fewer repower equipment orders than expected, but tax credits continue to incentivize fleet renewal alongside opportunities from increasing decommissioning* through 2030.

On the horizon

New building code guidelines will be published next year by the American Society of Civil Engineers (ASCE) that are expected to require wind turbines constructed in tornado-prone areas to meet certain design requirements. These requirements will increase costs for wind energy projects throughout most of the country when the project site is found to exceed certain thresholds for tornado speeds and the turbines exceed defined structure exposure limits.



Contacts

Comments, feedback and further questions

- We hope you found this report valuable and welcome your feedback on its scope, content, and findings. Client input plays an important role in helping us refine, expand, and improve our research, and we greatly appreciate your comments and suggestions.
- If you require additional information or support, please do not hesitate to contact us using the details provided opposite.
- We would also be pleased to discuss any questions related to this report or broader topics affecting the US renewable energy and power markets. We look forward to hearing from you.

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