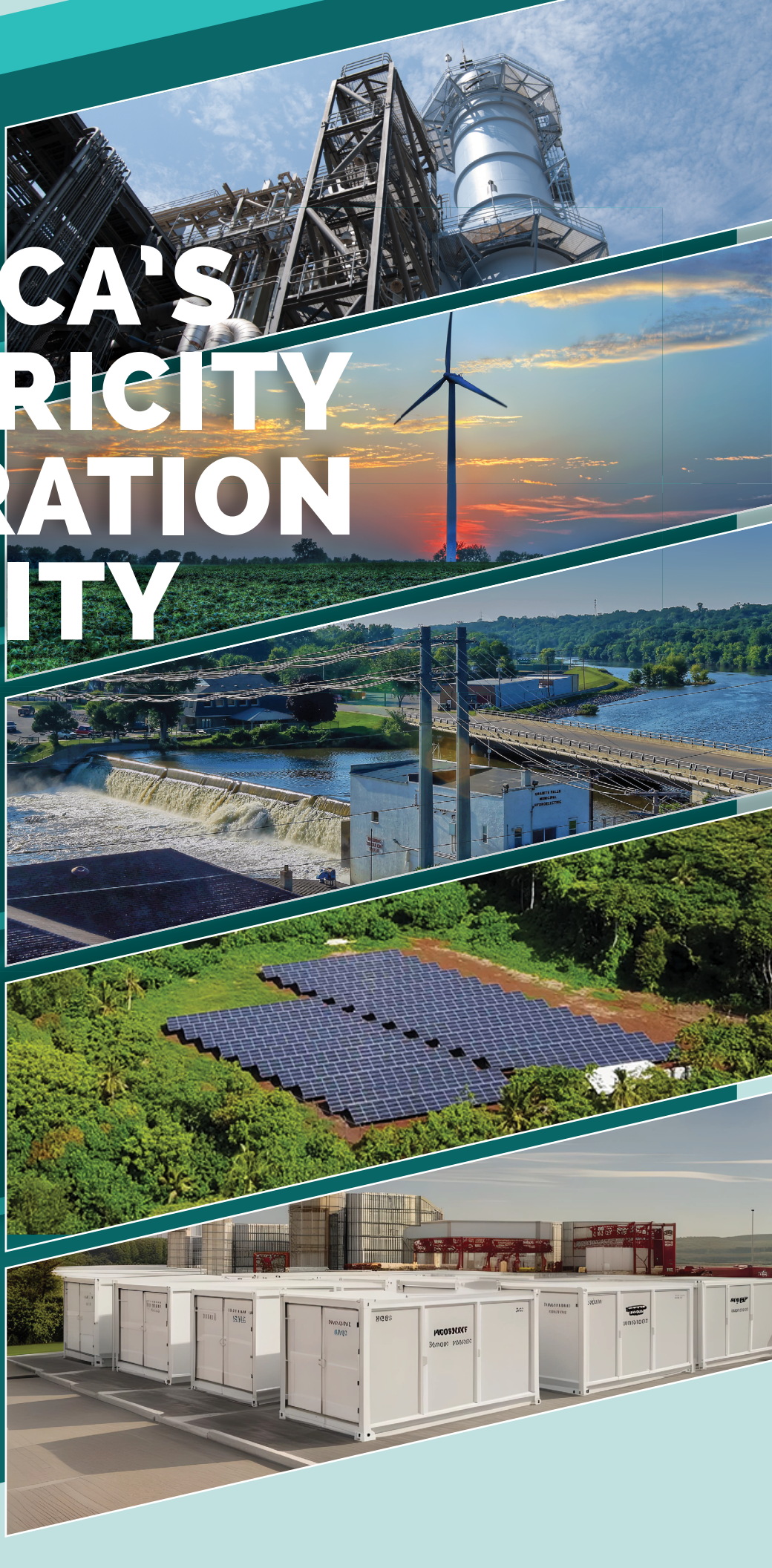
AMERICA'S ELECTRICITY GENERATION CAPACITY

2026 UPDATE



AMERICAN PUBLIC POWER ASSOCIATION

Powering Strong Communities

AMERICA'S ELECTRICITY GENERATION CAPACITY

2026 UPDATE

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AMERICAN PUBLIC POWER ASSOCIATION

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Cover photos, top to bottom: Burbank Water and Power's combined cycle plant, Central Municipal Power Agency/ Service's Mountain Lake wind turbine, Central Municipal Power Agency/Service's Granite Falls Hydroelectric Project, Ofu microgrid facility in American Samoa, proposed design of a battery storage system at City Utilities of Springfield, Missouri.

AMERICAN PUBLIC POWER ASSOCIATION
Powering Strong Communities

The American Public Power Association is the voice of not-for-profit, community-owned utilities that power approximately 2,000 towns and cities nationwide. We represent public power before the federal government to protect the interests of the more than 55 million people that public power utilities serve across the United States and its territories. We advise on electricity policy, grid technology and operations, and workforce development in support of safe, modern, and resilient utilities.

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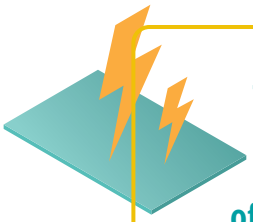
EXECUTIVE SUMMARY

The American Public Power Association's annual report on current and imminent electricity generation capacity in the United States breaks down the nearly 1.4 terawatts of utility-scale capacity by fuel, region, and ownership.



The U.S. has nearly
1.4 TW
of generation capacity

Generation capacity refers to the maximum potential power output of an electricity generation source, i.e., the amount of power a plant can produce if it were running at full power. Capacity is measured in megawatts (MW). This should not be confused with **generation**, which is the actual power output of a generation facility and is often measured in megawatt-hours (MWh). This report covers generation capacity only.

Current Capacity

The largest fuel source is natural gas, accounting for just under 42% of all generation capacity. Coal, with a share of 14%, represents the second largest source of generation capacity. Solar, wind, nuclear, and hydro together account for nearly 40% of all capacity.

Under Development

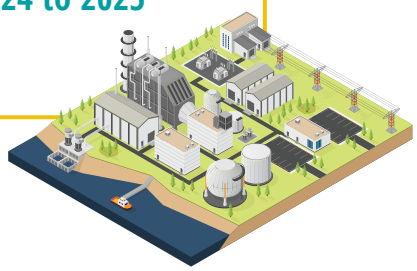
494,823 MW of new generation capacity is under development in the United States, which is comparable to the total capacity under development for the last two years. This includes 154,231 MW under construction or permitted and 340,591 MW proposed or pending application. Around 10,000 MW have moved from the pending or proposed to construction or permitted stage in the past year.

A majority of all new generation capacity under development is for solar energy (54%), followed by wind (23%) and natural gas (17%). However, nearly two-thirds of the wind capacity is in the proposed stage, which is the earliest and most uncertain stage of development and includes units that are least likely to be built. Trends in the development stages of the share of fuel type continue to show that wind capacity is far less likely than solar to move to the application phase and beyond.

Additionally, there is notably less wind and more natural gas in the pipeline in 2025 than in years past. Compared to 2024, the total MW under development in 2025 were 14% less for wind projects and 62% more for natural gas generation projects.

Despite accounting for approximately 10% of all current capacity, public power projects account for just over 2% of all projects in the development pipeline. A large majority (89%) of capacity in development is owned by non-utility generators.

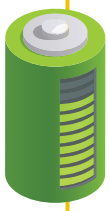
The total natural gas capacity under development increased
62%
from 2024 to 2025



Continued Growth of Solar and Energy Storage

For the fifth year in a row, solar was the leading source of new utility-scale capacity. In 2025, nearly 30,000 MW of solar capacity came online, roughly in line with last year. An additional 44,000 MW are under preparation, testing, or construction and projected to come online in 2026.

Over 18,000 MW of energy storage were added in 2025 to supplement generation capacity, increasing the total MW of energy storage 63% within the last year and 171% in the last two years. Another 23,810 MW of energy storage under preparation, testing, or construction are projected to come online in 2026.



Over
18,000 MW
of energy storage were added in 2025

Retirements and Cancellations

Nearly 76,000 MW of planned generation capacity developments were canceled in 2025 – roughly twice as much as 2024. Wind accounted for a majority (63%) of the cancellations, followed by solar (31%).

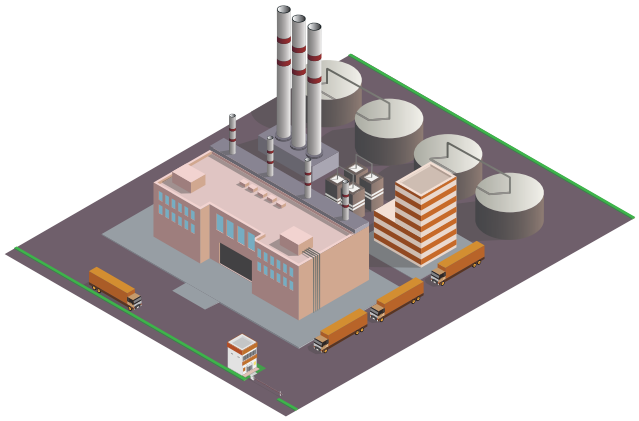
Generation capacity additions (43,413 MW) far outpaced the total generation capacity retired (5,495 MW) in 2025. Retirements in 2025 were driven by coal-fired facilities (63%), with nearly 3,500 MW retired. 87,286 MW of coal has been retired since 2017. Nearly 52,000 MW in coal capacity is planned to be retired through 2030, which represents 27% of the current generation capacity of all coal-fired facilities.

In 2025,
43,413 MW
were added, far outpacing the
5,495 MW
retired

Data analyzed for this report was taken from the Hitachi Energy Velocity Suite database, accessed January and February 2026. All figures in this report represent utility-scale capacity only and do not include distributed and other small-scale generation capacity. This report includes generation capacity data from 50 U.S. states as well as American Samoa, Puerto Rico, Guam, Northern Mariana Islands, and the U.S. Virgin Islands.

Energy storage is included in this report due to its increasing deployment and role in integrating renewable energy resources on the grid. While energy storage is not a generating capacity fuel type, it is a means for capturing and reserving energy for later use and can help address challenges posed by intermittent and distributed energy resources. In this report, pumped hydro storage is classified as hydropower capacity. Megawatts of energy storage are not included as a part of the generation capacity totals and are instead reported as standalone additions highlighted in yellow.

1. CURRENT GENERATION CAPACITY



Current nameplate capacity includes capacity labeled as operating, including units that have been restarted as well as capacity that is on standby or mothballed.

Table 1.1 shows the sources from which electricity can be generated in the U.S. Natural gas facilities make up a plurality of America's current generation capacity, followed by coal, solar, and wind resources. In addition to the 1.4 TW nameplate capacity, there are 47,985 MW of supplemental energy storage in the U.S.

CATEGORIES OF OPERATING CAPACITY

OPERATING: Generator available to operate

RESTART: Generator brought back online after being out of service, retired, or mothballed for more than three months

STANDBY: Generator available for service but not normally used, or on short term scheduled or forced outage for less than three months

MOTHBALLED: Generator taken out of service but not retired, unit is able to come back online

Table 1.1
Electric Generation Capacity by Fuel Type, 2025

Fuel Type	MW	Share
Natural Gas	573,452.37	41.85%
Coal	192,364.87	14.04%
Solar	168,113.88	12.27%
Wind	162,377.55	11.85%
Nuclear	104,386.36	7.62%
Hydro	102,113.77	7.45%
Distillate Fuel Oil	23,829.61	1.74%
Residual Fuel Oil	15,619.20	1.14%
Wood/Wood Waste Solids	4,700.61	0.34%
Geothermal	4,203.29	0.31%
Wood Waste Liquids	4,153.35	0.30%
Petroleum Coke	2,412.70	0.18%
Waste	2,346.34	0.17%
Landfill Gas	2,015.75	0.15%
Kerosene	1,865.80	0.14%
Other Gas	1,521.85	0.11%
Waste Heat	1,335.84	0.10%
Blast Furnace Gas	850.70	0.06%
Biomass Gases	520.63	0.04%
Other	491.59	0.04%
Jet Fuel	369.24	0.03%
Purchased steam	344.50	0.03%
Agriculture Byproduct	283.90	0.02%
Biomass Liquids	190.29	0.01%
Biomass Solids	143.66	0.01%
Waste Oil and Other Oil	135.11	0.01%
Liquified Natural Gas	50.63	0.00%
Biomass Other	24.00	0.00%
Liquified Propane Gas	21.00	0.00%
Refuse	15.40	0.00%
Propane	5.23	0.00%
Total	**1,370,261.00**	
Energy Storage	47,985.16	

Table 1.2 shows how America's current generation capacity is distributed throughout different regions of the U.S. These regions include current defined regions of the North American Electric Reliability Corporation, as well as U.S. territories, in accordance with how the Energy Information Administration collects and reports this information.

Table 1.2
Current Electricity Generation Capacity by Region, 2025

Region	MW	Share
SERC	392,429.37	28.64%
WECC	275,100.97	20.08%
RF	258,213.13	18.84%
Texas RE	163,035.74	11.90%
SPP	90,023.40	6.57%
MRO	89,460.06	6.53%
NPCC	86,817.77	6.34%
U.S. Territories	8,272.12	0.60%
HCC	3,618.33	0.26%
ASCC	3,290.10	0.24%
Total	**1,370,261.00**	

REGIONS
(see map in Appendix)

ASCC: Alaska Systems Coordinating Council

HCC: Hawaii Coordinating Council

MRO: Midwest Reliability Organization

NPCC: Northeast Power Coordinating Council

RF: ReliabilityFirst

SERC: SERC Reliability Corporation

SPP: Southwest Power Pool

Texas RE: Texas Reliability Entity

WECC: Western Electricity Coordinating Council

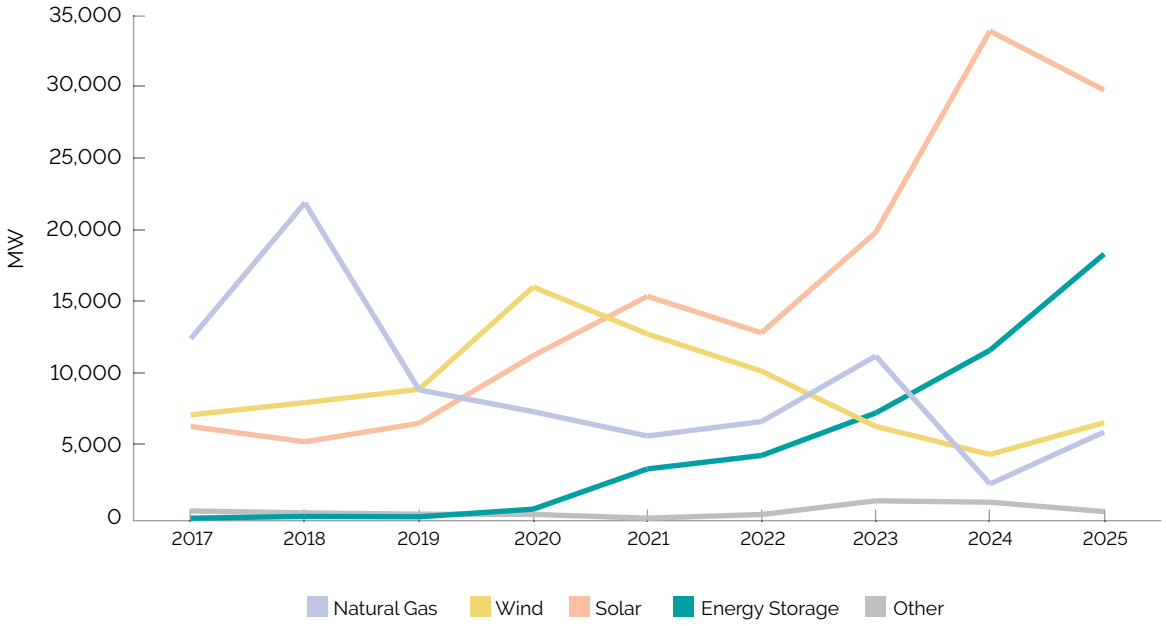
Alaska (ASCC), Hawaii (HCC), and U.S. territories are not a part of NERC, but are included in the total electricity generation. Territories include Puerto Rico, American Samoa, Guam, Northern Mariana Islands, and the U.S. Virgin Islands.

Table 1.3 shows the utility-scale generation capacity additions from 2017-2025. More than 98% of the 314,637 MW in additions were from solar, natural gas, and wind facilities.

Table 1.3
Generation Capacity Additions by Fuel Type, 2017-2025

Fuel Type	MW	Share
Solar	142,512.96	45.29%
Natural Gas	84,091.30	26.73%
Wind	82,046.19	26.08%
Nuclear	2,217.00	0.70%
Distillate Fuel Oil	1,308.95	0.42%
Hydro	692.26	0.22%
Geothermal	656.10	0.21%
Wood/Wood Waste Solids	409.45	0.13%
Waste Heat	144.81	0.05%
Biomass Gases	108.12	0.03%
Wood Waste Liquids	75.00	0.02%
Landfill Gas	71.00	0.02%
Blast Furnace Gas	70.00	0.02%
Liquified Natural Gas	50.63	0.02%
Biomass Liquids	50.00	0.02%
Other	48.25	0.02%
Liquified Propane Gas	21.00	0.01%
Coal	17.00	0.01%
Biomass Other	13.34	0.00%
Other Gas	11.20	0.00%
Waste	8.19	0.00%
Biomass Solids	6.40	0.00%
Propane	3.60	0.00%
Waste Oil and Other Oil	3.00	0.00%
Jet Fuel	1.30	0.00%
Total	**314,637.04**	
Energy Storage	47,407.03	

Figure 1.1 Capacity Additions by Year, 2017-2025



Note: This table uses the most up-to-date data from Hitachi Energy Velocity Suite database and therefore capacity in MW may change slightly from year to year when the database is updated.

"Other" capacity resources in this graph include nuclear, hydro, distillate fuel oil, geothermal, wood/wood waste solids, biomass gases, waste heat, wood waste liquids, blast furnace gas, landfill gas, liquified natural gas, biomass liquids, other, liquified propane gas, coal, biomass other, waste, biomass solids, waste oil and other oil, propane, jet fuel, other gas.

Figure 1.1 shows the capacity additions by fuel type from 2017-2025.

Between 2017 and 2018, natural gas was the leading resource for generation capacity additions. In 2020, more solar and wind capacity came online than natural gas. Since 2021, more solar capacity has come online than any other energy source, particularly from 2023 to 2024. Both wind and natural gas had increases in 2025 compared to last year. Energy storage capacity has also significantly increased in the past two years.

Table 1.4 shows the fuel types of the 43,413 MW of generation capacity that began operating in 2025, including 18,479 MW of additional energy storage. Solar continues to dominate the share of new generation capacity and made up over 68% of generation capacity additions in 2025.

Table 1.4
Generation Capacity Additions by Fuel Type, 2025

Fuel Type	MW	Share
Solar	29,840.58	68.74%
Wind	6,795.32	15.65%
Natural Gas	6,146.50	14.16%
Distillate Fuel Oil	593.10	1.37%
Waste Heat	16.64	0.04%
Other Gas	8.50	0.02%
Hydro	3.50	0.01%
Landfill Gas	3.20	0.01%
Wood/Wood Waste Solids	2.95	0.01%
Biomass Other	2.60	0.01%
Total	**43,412.89**	
Energy Storage	18,479.06	

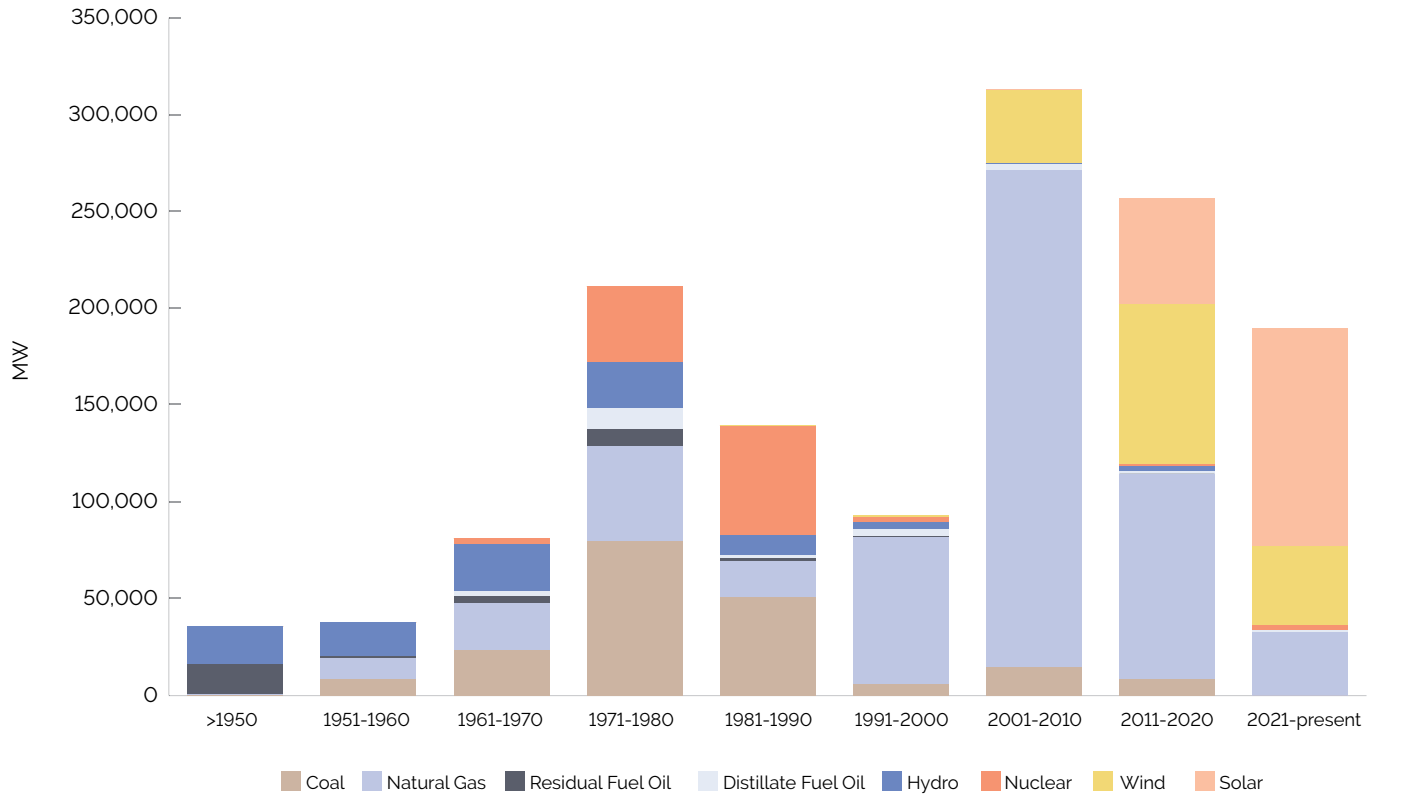
Table 1.5 shows the 53,272 MW of generation capacity under preparation, testing, and construction that are scheduled to come online in 2026. Additionally, more than 23,800 MW of energy storage are scheduled to come online in 2026. The largest share of capacity slated to come online in 2026 is from solar facilities (66%). Wind capacity makes up the next largest portion of projected new capacity in 2025 at 21%, and natural gas makes up 12%.

Figure 1.2 shows the age of currently operational generation capacity facilities by fuel type. Most hydro and coal facilities are more than 40 years old, having come online by 1980. Almost all domestic nuclear capacity became operational between 1969-1990. While natural gas capacity dates to the 1950s, the bulk of current natural gas capacity is less than 25 years old. Most solar capacity has come online since 2021.

Table 1.5
Projected Generation Capacity Additions, 2026

Fuel Type	MW	Share
Solar	35,028.92	65.76%
Wind	11,433.33	21.46%
Natural Gas	6,568.50	12.33%
Geothermal	100.00	0.19%
Biomass Solids	36.00	0.07%
Hydro	31.72	0.06%
Waste	20.00	0.04%
Biomass Gases	17.20	0.03%
Distillate Fuel Oil	16.15	0.03%
Waste Heat	11.28	0.02%
Biomass Other	4.60	0.01%
Landfill Gas	3.00	0.01%
Other	0.92	0.00%
Total	**53,271.63**	
Energy Storage	23,809.83	

Figure 1.2
Age of Electric Generation Facilities by Type



2. FUTURE GENERATION CAPACITY BY DEVELOPMENT STAGE

Tables 2.1–2.4 show the fuel makeup of generation capacity under construction, permitted, with an application pending, or proposed. Solar comprises the largest share of all four development categories. If listed as capacity, the total MW of energy storage in development would be the second largest share in each category except for pending application, where it would be the largest share.

Table 2.1 shows the sources for the 76,936 MW of generation capacity under site preparation, testing, and construction — an 18% increase compared to 2024. Wind and solar account for nearly 80% of the capacity under construction, with natural gas making up nearly all the rest. Natural gas under construction more than doubled in 2025 to 14,000 MW, reversing the declining trend from last year.

Table 2.1
Plants Under Construction by Fuel Type, 2025

Fuel Type	MW	Share
Solar	43,914.17	57.08%
Wind	17,396.03	22.61%
Natural Gas	14,228.10	18.49%
Nuclear	680.00	0.88%
Geothermal	464.80	0.60%
Other Gas	50.00	0.06%
Waste Heat	39.88	0.05%
Biomass Gases	38.20	0.05%
Biomass Solids	36.00	0.05%
Hydro	31.72	0.04%
Distillate Fuel Oil	23.95	0.03%
Waste	20.00	0.03%
Agriculture Byproduct	5.00	0.01%
Biomass Other	4.60	0.01%
Landfill Gas	3.00	0.00%
Other	0.92	0.00%
Total	**76,936.38**	
Energy Storage	23,809.83	

Table 2.2 shows the fuel makeup for plants that have received permits but have not yet started construction. Solar is the leading resource for permitted plants, accounting for more than 62% of the 77,295 MW of permitted generation capacity. Wind and natural gas account for almost another third of capacity in this category.

Table 2.2
Permitted Plants by Fuel Type, 2025

Fuel Type	MW	Share
Solar	48,364.70	62.57%
Natural Gas	17,572.46	22.73%
Wind	7,093.06	9.18%
Hydro	3,581.75	4.63%
Nuclear	430.00	0.56%
Geothermal	180.00	0.23%
Biomass Gases	50.00	0.06%
Distillate Fuel Oil	23.00	0.03%
Total	**77,294.97**	
Energy Storage	24,281.11	

Table 2.3 shows the fuel mix for the 94,767 MW of generation capacity awaiting approval of applications. Solar makes up most of the capacity in this category, with natural gas and wind accounting for nearly another third. However, the total storage pending application (nearly 72 gigawatts) is higher than the total solar capacity in this stage.

Table 2.3
Plants Pending Application by Fuel Type, 2025

Fuel Type	MW	Share
Solar	59,544.74	62.83%
Natural Gas	17,882.54	18.87%
Wind	11,585.76	12.23%
Hydro	3,746.48	3.95%
Nuclear	1,400.00	1.48%
Other	500.00	0.53%
Geothermal	40.00	0.04%
Coal	35.00	0.04%
Distillate Fuel Oil	27.50	0.03%
Landfill Gas	4.60	0.00%
Total	**94,766.61**	
Energy Storage	71,951.96	

Figure 2.1
Share of Fuel Type by Stage of Development, 2025

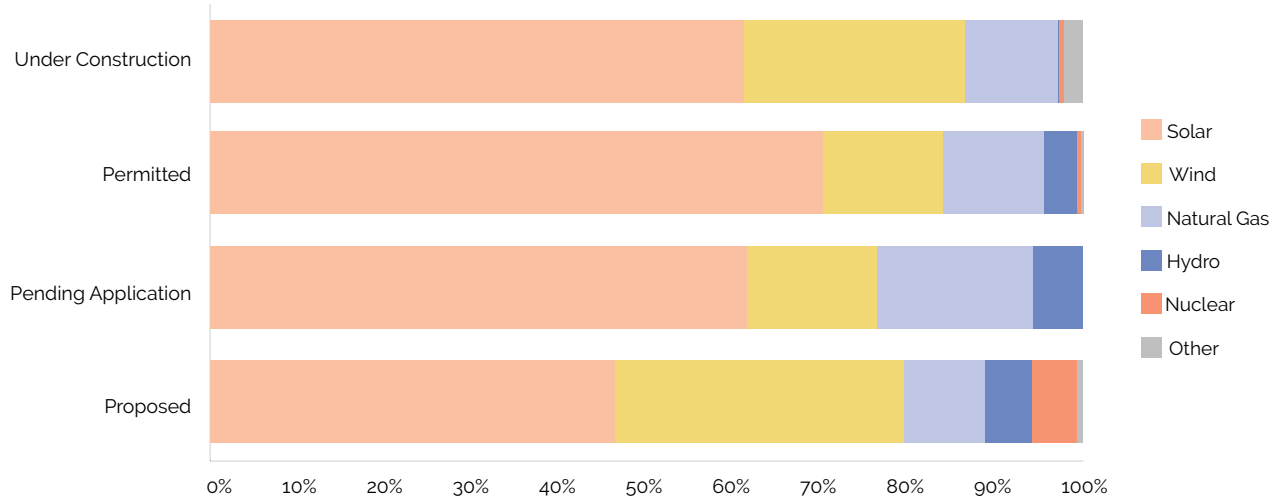


Table 2.4 shows the resource mix for the 245,825 MW of generation capacity in the proposal stage. This is the earliest and most uncertain stage of development and includes units that are least likely to be built. Over 114,000 MW (47%) of the proposed capacity is solar, followed by 69,000 MW of wind, which has been the leading resource at the proposed stage of development in recent years. There are approximately 11,000 MW fewer wind projects proposed in 2025 than there had been in 2024 while proposed natural gas plants have grown by nearly 12,000 MW.

Table 2.4
Proposed Plants by Fuel Type, 2025

Fuel Type	MW	Share
Solar	114,483.20	46.57%
Wind	69,098.71	28.11%
Natural Gas	36,108.82	14.69%
Hydro	13,248.63	5.39%
Nuclear	11,522.40	4.69%
Residual Fuel Oil	632.40	0.26%
Other Gas	313.00	0.13%
Distillate Fuel Oil	114.00	0.05%
Geothermal	110.32	0.04%
Biomass Liquids	103.40	0.04%
Landfill Gas	50.40	0.02%
Waste Heat	33.55	0.01%
Other	5.00	0.00%
Biomass Other	0.93	0.00%
Total	**245,824.76**	
Energy Storage	97,708.03	

Figure 2.1 tracks the major fuel sources in each stage of development. Solar comprises the majority of the fuel share for all stages of development. The share of wind capacity falls from the proposal to application process.

Table 2.5 shows the total energy storage capacity (for projects 1 MW or more) by development stage. Energy storage is getting added alongside — and standalone from — capacity projects. These totals do not include pumped hydro systems. There was over 52,000 MW more storage in the development stage in 2025 than in 2024.

Table 2.5
Energy Storage by Development Stage, 2025

Development Stage	MW
Under Construction	23,809.83
Permitted Plants	24,281.11
Pending Application	71,951.96
Proposed	97,708.03
Total	**217,750.93**

3. FUTURE GENERATION CAPACITY BY REGION

Tables 3.1–3.4 show new plants that are under construction or planned for construction in each region (See Appendix for definition of regions and included states).

Table 3.1 shows that SERC, WECC, and Texas RE account for a majority (71%) of the capacity under construction, while another 16% are in RF.

Table 3.1
Plants Under Construction by Region, 2025

Region	MW	Share
SERC	21,578.84	28.05%
WECC	19,147.22	24.89%
Texas RE	13,948.90	18.13%
RF	12,067.28	15.68%
NPCC	4,622.63	6.01%
SPP	3,221.30	4.19%
MRO	2,107.10	2.74%
HCC	125.00	0.16%
U.S. Territories	118.10	0.15%
Total	**76,936.38**	

Figure 3.1
Plants Under Construction by Region, 2025

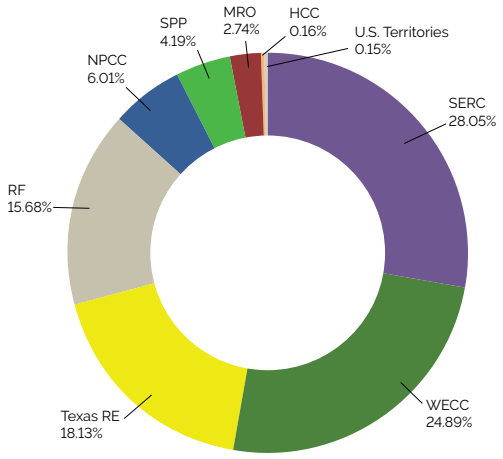
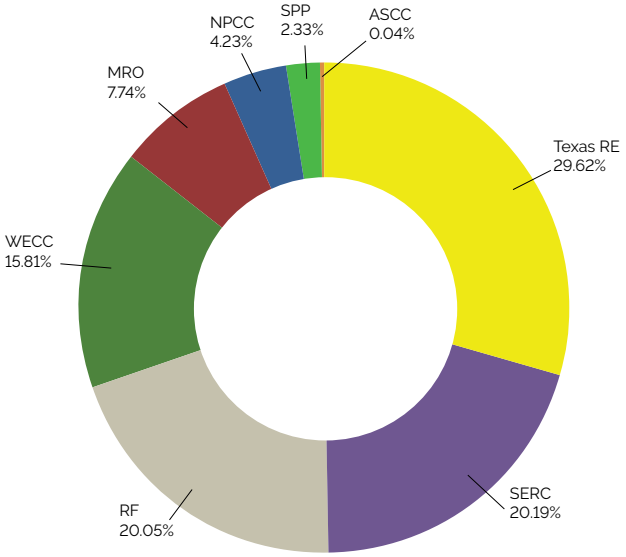


Table 3.2 shows Texas RE has the most generation capacity permitted, followed by SERC, RF, and WECC. Although Texas RE permitting fell by almost 10,000 MW this year, RF increased by nearly 6,000 MW compared to 2024.

Table 3.2
Permitted Plants by Region, 2025

Region	MW	Share
Texas RE	22,891.40	29.62%
SERC	15,603.30	20.19%
RF	15,497.66	20.05%
WECC	12,223.45	15.81%
MRO	5,982.17	7.74%
NPCC	3,266.79	4.23%
SPP	1,800.81	2.33%
ASCC	29.40	0.04%
Total	**77,294.97**	

Figure 3.2
Permitted Plants by Region, 2025



Tables 3.3 and 3.4 show plants in the pending application and proposed categories. Texas RE has a plurality of the generation capacity in the pending application stage (47%), while SERC has the largest share of capacity in the proposed stage (27%) followed by WECC (24%).

Table 3.3
Plants Pending Application by Region, 2025

Region	MW	Share
Texas RE	45,082.68	47.57%
WECC	21,747.12	22.95%
SERC	9,867.12	10.41%
RF	6,535.51	6.90%
SPP	5,879.53	6.20%
MRO	4,806.76	5.07%
NPCC	828.10	0.87%
ASCC	19.80	0.02%
Total	**94,766.61**	

Figure 3.3
Plants Pending Application by Region, 2025

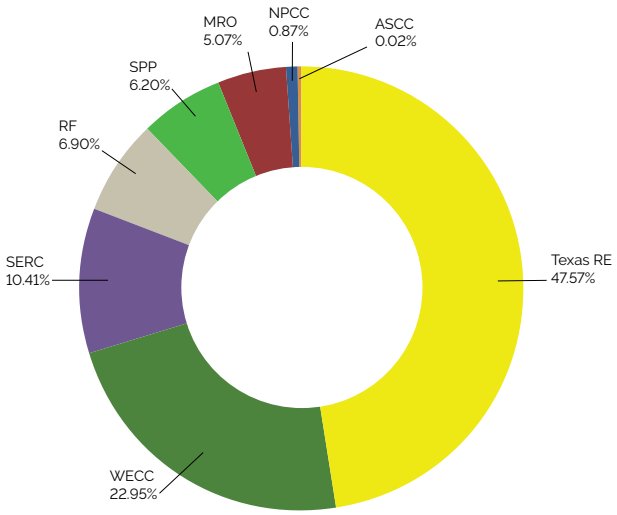


Table 3.4
Proposed Plants by Region, 2025

Region	MW	Share
SERC	65,927.45	26.82%
WECC	59,140.30	24.06%
NPCC	50,286.82	20.46%
RF	49,037.66	19.95%
Texas RE	9,089.48	3.70%
MRO	7,066.46	2.87%
SPP	4,092.20	1.66%
ASCC	720.00	0.29%
HCC	264.39	0.11%
Total	**245,824.76**	

Figure 3.4
Proposed Plants by Region, 2025

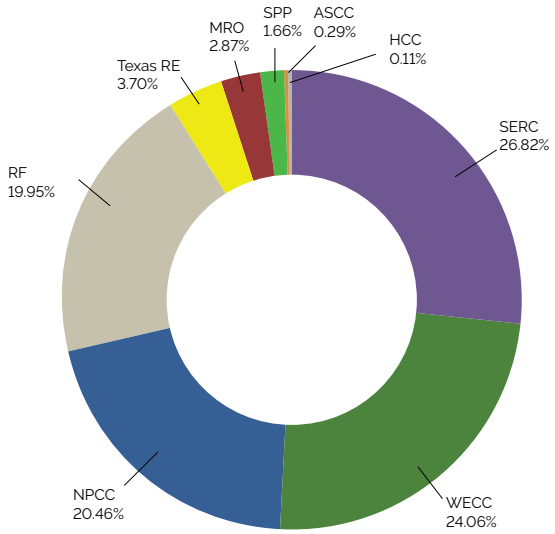


Table 3.5
New Generating Capacity Compared to Current Generation by Region, 2025

Sorted by under construction

Region	Under Construction		Permitted Plants		Pending Application		Proposed		2025 U.S. Generation	
	MW	*Share*	*MW*	*Share*	*MW*	*Share*	*MW*	*Share*	*TWh*	*Share*
SERC	21,579	28%	15,603	20%	9,867	10%	65,927	27%	1,213	33%
WECC	19,147	25%	12,223	16%	21,747	23%	59,140	24%	577	16%
Texas RE	13,949	18%	22,891	30%	45,083	48%	9,089	4%	440	12%
RF	12,067	16%	15,498	20%	6,535	7%	49,038	20%	834	23%
NPCC	4,623	6%	3,267	4%	828	1%	50,283	20%	200	5%
SPP	3,221	4%	1,801	2%	5,879	6%	4,092	2%	200	5%
MRO	2,107	3%	5,982	8%	4,807	5%	7,066	3%	200	5%
HCC	125	0%	0	0%	0	0%	264	0%	8	0%
U.S. Territories	118	0%	0	0%	0	0%	200	0%	15	0%
ASCC	0	0%	29	0%	20	0%	720	0%	1	0%

2025 generation source: Hitachi Velocity Suite Database, accessed February 2026. Only includes states and Puerto Rico.

Table 3.5 shows the share of future generating capacity by region compared with actual generation in 2025. SERC has more than one-quarter of the share of plants under construction in the US as well as more than one-quarter that have been proposed. Additionally, despite only accounting for 12% of total generation, Texas RE has close to one-third of the share of permitted plants and nearly half of those with a pending application.

Tables 3.6 and 3.7 show the fuels of choice for proposed capacity by development stage.

As shown in Table 3.6, solar, natural gas, and wind account for over 96% of the capacity most likely to be built — plants already under construction or permitted. Solar makes up nearly two-thirds of this capacity. Nearly 11,000 MW more of capacity was permitted or under construction in 2025 compared to 2024, driven by a significant increase in natural gas plants.

Nearly

11,000 MW

more was permitted or under construction in 2025 compared to 2024

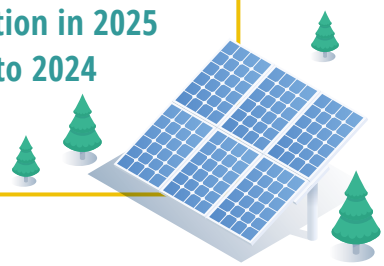


Table 3.6
Permitted Plants and Plants Under Construction by Fuel Type, 2025

Fuel Type	MW	Share
Solar	92,278.87	59.83%
Natural Gas	31,800.56	20.62%
Wind	24,489.09	15.88%
Hydro	3,613.47	2.34%
Nuclear	1,110.00	0.72%
Geothermal	644.80	0.42%
Biomass Gases	88.20	0.06%
Other Gas	50.00	0.03%
Distillate Fuel Oil	46.95	0.03%
Waste Heat	39.88	0.03%
Biomass Solids	36.00	0.02%
Waste	20.00	0.01%
Agriculture Byproduct	5.00	0.00%
Biomass Other	4.60	0.00%
Landfill Gas	3.00	0.00%
Other	0.92	0.00%
Total	**154,231.35**	
Energy Storage	48,014.14	

Table 3.7
Plants Pending Application and Proposed by Fuel Type, 2025

Fuel Type	MW	Share
Solar	174,027.94	51.10%
Wind	80,684.47	23.69%
Natural Gas	53,991.36	15.85%
Hydro	16,995.11	4.99%
Nuclear	12,922.40	3.79%
Residual Fuel Oil	632.40	0.19%
Other	505.00	0.15%
Other Gas	313.00	0.09%
Geothermal	150.32	0.04%
Distillate Fuel Oil	141.50	0.04%
Biomass Liquids	103.40	0.03%
Landfill Gas	55.00	0.02%
Coal	35.00	0.01%
Waste Heat	33.55	0.01%
Biomass Other	0.93	0.00%
Total	**340,591.37**	
Energy Storage	167,133.99	

Four regions — Texas RE, WECC, SERC, and RF — together account for approximately 86% of the capacity under construction and permitted. Solar is the leading resource in all four regions, followed by wind in WECC and natural gas in Texas RE, SERC, and RF. A plurality of all new wind capacity (41%) and almost all new hydropower (95%) under construction or permitted is in WECC.

As seen in Table 3.7, solar is the leading resource for proposed and pending application generation capacity, with wind and natural gas making up most of the remaining capacity. Compared to 2024, wind's share of pending and proposed plants decreased five percentage points.

Solar is the leading resource proposed or pending application in Texas RE, RF, SERC, WECC, SPP, and in Puerto Rico. Wind is the primary resource in MRO and NPCC.

4. FUTURE GENERATION CAPACITY BY OWNERSHIP TYPE

Tables 4.1–4.4 summarize the future generation capacity based on ownership. Non-utility generators account for most of the capacity in all four categories. For the tables below, federal includes the Tennessee Valley Authority, U.S. Army, and the Bureau of Land Management.

Table 4.1
Plants Under Construction by Owner Type, 2025

Owner Type	MW	Share
Non-utility generators	58,256.40	75.72%
Investor-owned	13,688.78	17.79%
Federal	3,216.40	4.18%
Public power	1,634.30	2.12%
Cooperative	140.50	0.00%
Total	**76,936.38**	

Table 4.2
Permitted Plants by Owner Type, 2025

Owner Type	MW	Share
Non-utility generators	67,542.26	87.38%
Investor-owned	7,300.70	9.45%
Public power	1,238.05	1.60%
Federal	960.00	1.24%
Cooperative	253.96	0.33%
Total	**77,294.97**	

Non-utility generators own the majority of plants that are permitted and under construction. Most of the capacity from non-utility generators that is permitted or under construction is for solar (68%). Natural gas is the leading resource that investor-owned, cooperative, and public power utilities have permitted or under construction.

Table 4.3
Plants Pending Application by Owner Type, 2025

Owner Type	MW	Share
Non-utility generators	83,813.81	88.44%
Investor-owned	7,730.40	8.16%
Cooperative	2,899.60	3.06%
Public power	322.80	0.34%
Total	**94,766.61**	

Table 4.4
Proposed Plants by Owner Type, 2025

Owner Type	MW	Share
Non-utility generators	206,231.58	83.89%
Investor-owned	28,884.84	11.75%
Public power	4,403.55	1.79%
Federal	3,478.78	1.42%
Cooperative	2,826.00	1.15%
Total	**245,824.76**	

Additionally, non-utility generators have the overwhelming majority of capacity that is proposed or pending application. Over 83% of the proposed and pending capacity from non-utility generators is for wind and solar. Prior to 2022, non-profit utilities (including public power and cooperatives) were not eligible for energy tax credits for wind and solar facilities. This limitation influenced public power ownership of renewable energy resources. Public power utilities procure most of their wind and solar energy supply through power purchase agreements (usually with non-utility generators) rather than direct ownership. Natural gas is the top resource that is proposed or pending for investor-owned, federal, public power, and cooperative utilities.

5. FUTURE GENERATION CAPACITY BY REGIONAL TRANSMISSION ORGANIZATION

Tables 5.1–5.4 show future generation capacity by regional transmission organization (RTO). A significant plurality of the capacity proposed and under construction is in non-RTO regions. The Electric Reliability Council of Texas (ERCOT) has the most capacity in the application pending and permitted stages.

Table 5.1
Plants Under Construction by RTO, 2025

Region	MW	Share
Non-RTO	25,566.90	33.23%
Midcontinent ISO	17,288.49	22.47%
ERCOT ISO	13,948.90	18.13%
PJM ISO	9,369.64	12.18%
New York ISO	3,571.55	4.64%
California ISO	3,349.20	4.35%
SPP	2,799.30	3.64%
New England ISO	1,042.38	1.35%
Total	**76,936.38**	

Table 5.2
Permitted Plants by RTO, 2025

Region	MW	Share
ERCOT ISO	22,891.40	29.62%
Non-RTO	18,406.78	23.81%
Midcontinent ISO	13,388.84	17.32%
PJM ISO	13,050.36	16.88%
SPP	3,446.41	4.46%
California ISO	2,844.40	3.68%
New York ISO	2,060.08	2.67%
New England ISO	1206.70	1.56%
Total	**77,294.97**	

Table 5.3
Plants Pending Application by RTO, 2025

Region	MW	Share
ERCOT ISO	44,895.94	47.38%
Non-RTO	22,996.16	24.27%
Midcontinent ISO	12,118.16	12.79%
SPP	6,114.27	6.45%
PJM ISO	3,922.74	4.14%
California ISO	3,891.26	4.11%
New York ISO	697.50	0.74%
New England ISO	130.60	0.14%
Total	**94,766.61**	

Table 5.4
Proposed Plants by RTO, 2025

Region	MW	Share
Non-RTO	79,608.16	32.38%
PJM ISO	53,110.04	21.60%
New York ISO	39,787.01	16.19%
Midcontinent ISO	33,754.94	13.73%
California ISO	15,980.58	6.50%
ERCOT ISO	8,909.48	3.62%
New England ISO	7,558.12	3.08%
SPP	7,116.43	2.89%
Total	**245,824.76**	

6. RETIREMENTS AND CANCELLATIONS

Tables 6.1 and 6.2 show generation capacity retirements by fuel type. From 2017-2025, 143,199 MW of generation capacity was retired. Following trends over the past few years, over half of this capacity was from coal-fired plants, and nearly a quarter was in natural gas.

Table 6.1
Retired Plants by Fuel Type, 2017-2025

Fuel Type	MW	Share
Coal	87,286.40	61.0%
Natural Gas	35,673.10	24.9%
Nuclear	6,119.68	4.3%
Residual Fuel Oil	4,688.30	3.3%
Distillate Fuel Oil	2,750.13	1.9%
Wind	1,460.18	1.0%
Wood/Wood Waste Solids	827.95	0.6%
Landfill Gas	692.00	0.5%
Wood Waste Liquids	679.20	0.5%
Hydro	647.13	0.5%
Solar	449.40	0.3%
Waste	448.20	0.3%
Geothermal	307.00	0.2%
Kerosene	273.30	0.2%
Other Gas	182.25	0.1%
Waste Heat	146.00	0.1%
Biomass Solids	114.00	0.1%
Jet Fuel	100.20	0.1%
Purchased Steam	86.40	0.1%
Agriculture Byproduct	84.10	0.1%
Blast Furnace Gas	67.50	0.0%
Petroleum Coke	60.00	0.0%
Biomass Gases	45.88	0.0%
Waste Oil and Other Oil	10.20	0.0%
Other	1.00	0.0%
Total	**143,199.49**	

The total capacity retired in 2025 (5,495 MW) was driven almost entirely by coal (63%) and natural gas (32%).

Table 6.2
Retired Plants by Fuel Type, 2025

Fuel Type	MW	Share
Coal	3,458.90	62.9%
Natural Gas	1,764.20	32.1%
Other Gas	108.00	2.0%
Wood Waste Liquids	101.20	1.8%
Distillate Fuel Oil	52.00	0.9%
Landfill Gas	6.40	0.1%
Solar	4.70	0.1%
Total	**5,495.40**	

Table 6.3 reflects planned retirements that have been announced over the next five years. Over 75,000 MW of current operating capacity is scheduled to retire by 2030, over two-thirds (69%) of which is coal-fired, and just under a quarter is natural gas. More than a third (39%) of retirements planned by 2030 are in the SERC region and nearly another third (29%) are in the RF region. Over half (53%) of retirements in the next five years are plants owned by investor-owned utilities. Nearly 9% are for plants within public power ownership.

Table 6.3
Planned Retirements to 2030, by Fuel Type

Fuel Type	MW	Share
Coal	51,909.70	68.59%
Natural Gas	17,629.90	23.30%
Nuclear	2,323.22	3.07%
Residual Fuel Oil	1,362.70	1.80%
Distillate Fuel Oil	1,281.20	1.69%
Solar	415.30	0.55%
Wind	329.09	0.43%
Wood/Wood Waste Solids	243.50	0.32%
Waste	64.00	0.08%
Hydro	39.90	0.05%
Jet Fuel	37.20	0.05%
Kerosene	21.30	0.03%
Landfill Gas	16.80	0.02%
Biomass Gases	2.60	0.00%
Total	**75,676.41**	
Energy Storage	49.50	

As shown in Table 6.4, 75,861 MW of planned generation capacity additions were canceled in 2025 — roughly double the amount compared to 2024. Wind projects account for nearly two-thirds (63%) of the canceled capacity. Over 92% of canceled projects are by non-utility generators.

Table 6.4
Plant Cancellations by Fuel Type, 2025

Fuel Type	MW	Share
Wind	47,675.34	62.85%
Solar	23,730.00	31.28%
Natural Gas	3,476.40	4.58%
Hydro	872.00	1.15%
Geothermal	62.00	0.08%
Other	25.08	0.03%
Waste Heat	10.99	0.01%
Biomass Gases	7.20	0.01%
Distillate Fuel Oil	1.10	0.00%
Other Gas	0.30	0.00%
Landfill Gas	0.20	0.00%
Total	**75,860.61**	
Energy Storage	23,605.56	

Since 2017, over 418,000 MW of planned generation capacity additions were ultimately canceled, well above the capacity that was added. Wind accounts for over a third (38%) of canceled capacity.

Table 6.5
Plant Cancellations by Fuel Type, 2017-2025

Fuel Type	MW	Share
Wind	157,102.57	37.5%
Solar	123,899.34	29.6%
Natural Gas	94,346.51	22.5%
Hydro	15,194.04	3.6%
Nuclear	14,780.00	3.5%
Coal	7,587.00	1.8%
Geothermal	2,058.10	0.5%
Petroleum Coke	1,196.00	0.3%
Other	994.18	0.2%
Wood/Wood Waste Solids	466.10	0.1%
Waste	292.60	0.1%
Biomass Solids	231.40	0.1%
Landfill Gas	170.42	0.0%
Other Gas	140.80	0.0%
Distillate Fuel Oil	94.90	0.0%
Biomass Gases	87.82	0.0%
Agriculture Byproduct	81.20	0.0%
Waste Heat	76.83	0.0%
Biomass Other	58.06	0.0%
Biomass Liquids	19.00	0.0%
Total	**418,876.87**	
Energy Storage	43,541.19	

Figure 6.1
Additions, Cancellations, and Retirements, 2017-2025

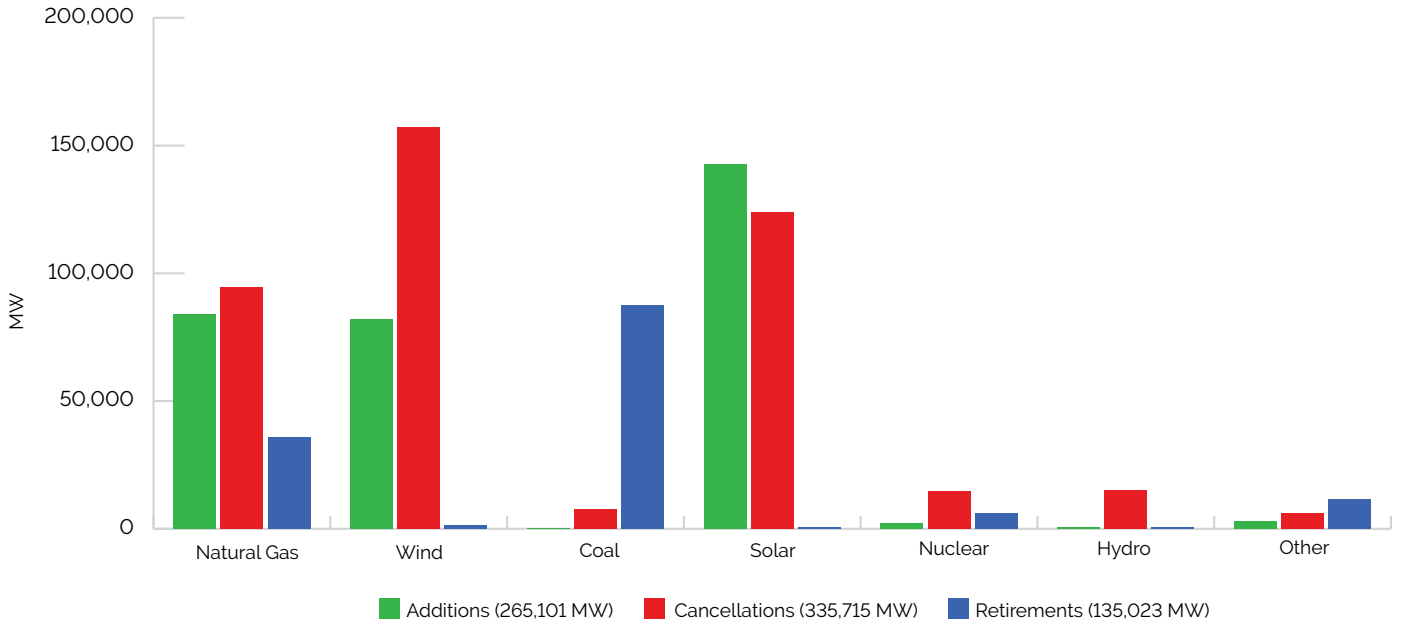


Figure 6.1 shows generation capacity additions, cancellations, and retirements from 2017 to 2025. While additions far exceeded retirements, cancellations also exceeded additions.

Figure 6.2
Additions and Retirements, 2017-2025, Plus Planned Retirements to 2030

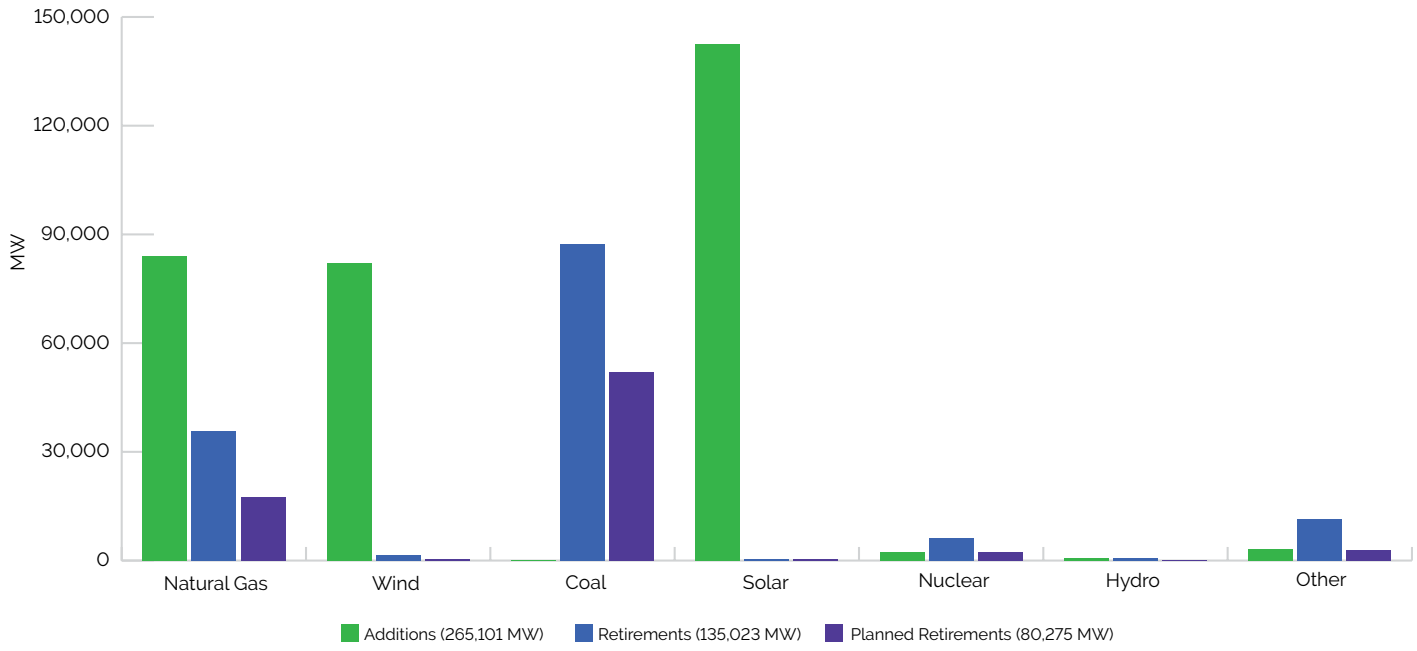
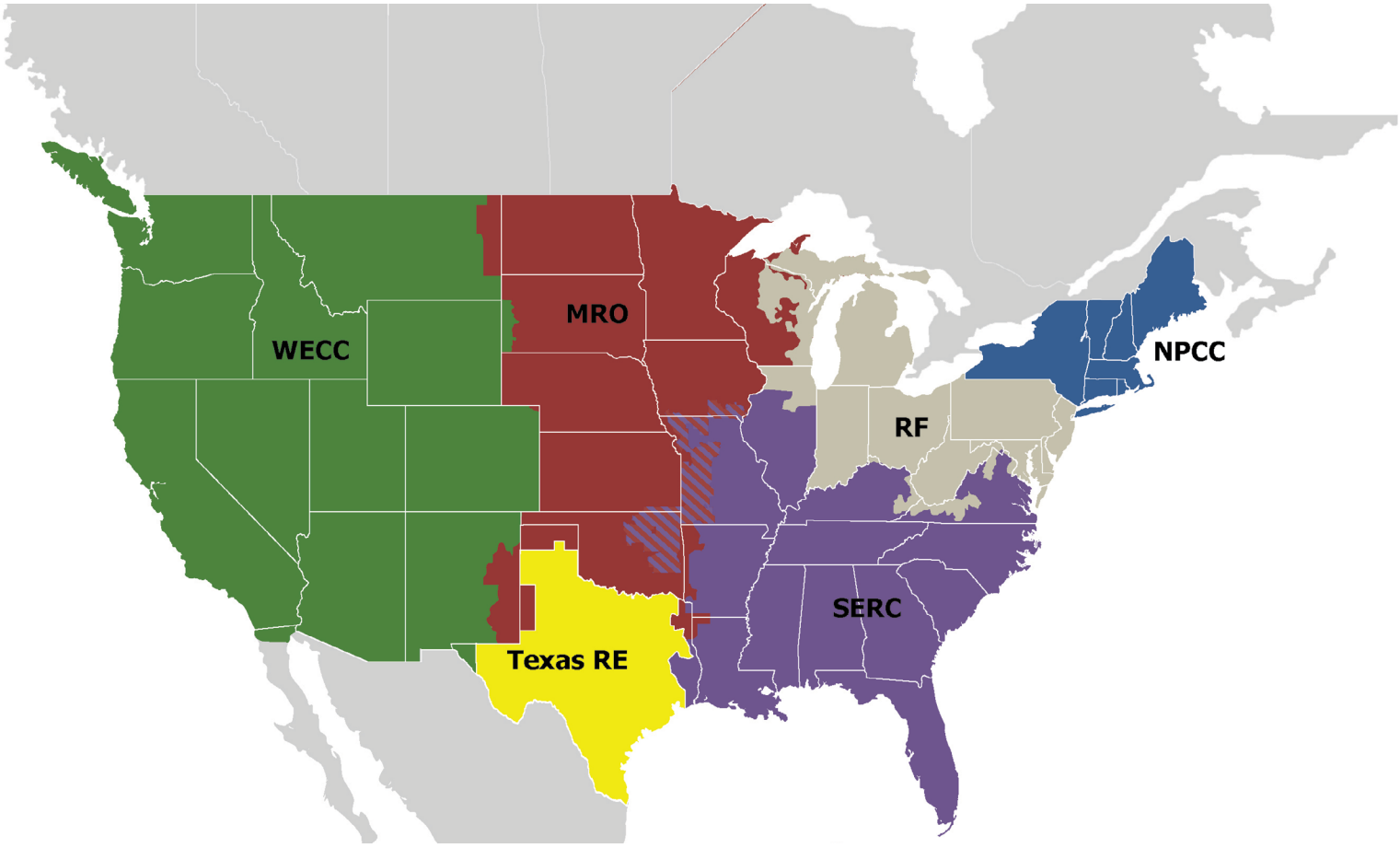


Figure 6.2 shows generation capacity additions and retirements from 2017-2025 as well as planned retirements to 2030. Additions make up for more than both current as well as planned retirements.

APPENDIX. REGIONAL DEFINITIONS



The regions in this report align with the following regions as defined by the North American Electric Reliability Council:

MRO: Midwest Reliability Organization

NPCC: Northeast Power Coordinating Council

RF: ReliabilityFirst

SERC: SERC Reliability Corporation

Texas RE: Texas Reliability Entity

WECC: Western Electricity Coordinating Council

ASCC: Alaska Systems Coordinating Council (not shown)

HCC: Hawaii Coordinating Council (not shown)

The independent system operator that operates the electric grid for nearly all of Texas is the Texas Reliability Entity (Texas RE), and is the name used for this region in the report. The Texas RE monitors and enforces compliance with reliability standards for NERC.

Regions in this report only include plants in the United States and exclude plants in Canada.

U.S. Territories: These areas are not a part of NERC, but are included in the total electricity generation. Territories include Puerto Rico, American Samoa, Guam, Northern Mariana Islands, and the U.S. Virgin Islands.

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