

Where 2026 Storage Will Concentrate

A market-prioritization view of planned U.S. solar and battery additions.



Agenda

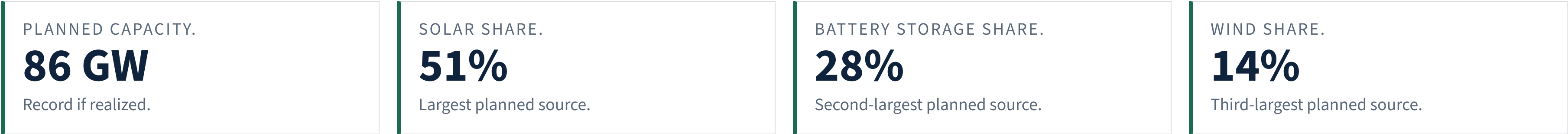
01 National buildout.

02 Solar concentration.

03 Storage concentration.

04 Recommended sequence.

The 2026 pipeline makes solar and storage the central buildout



Texas commands the 2026 utility-scale solar pipeline



Solar leader.

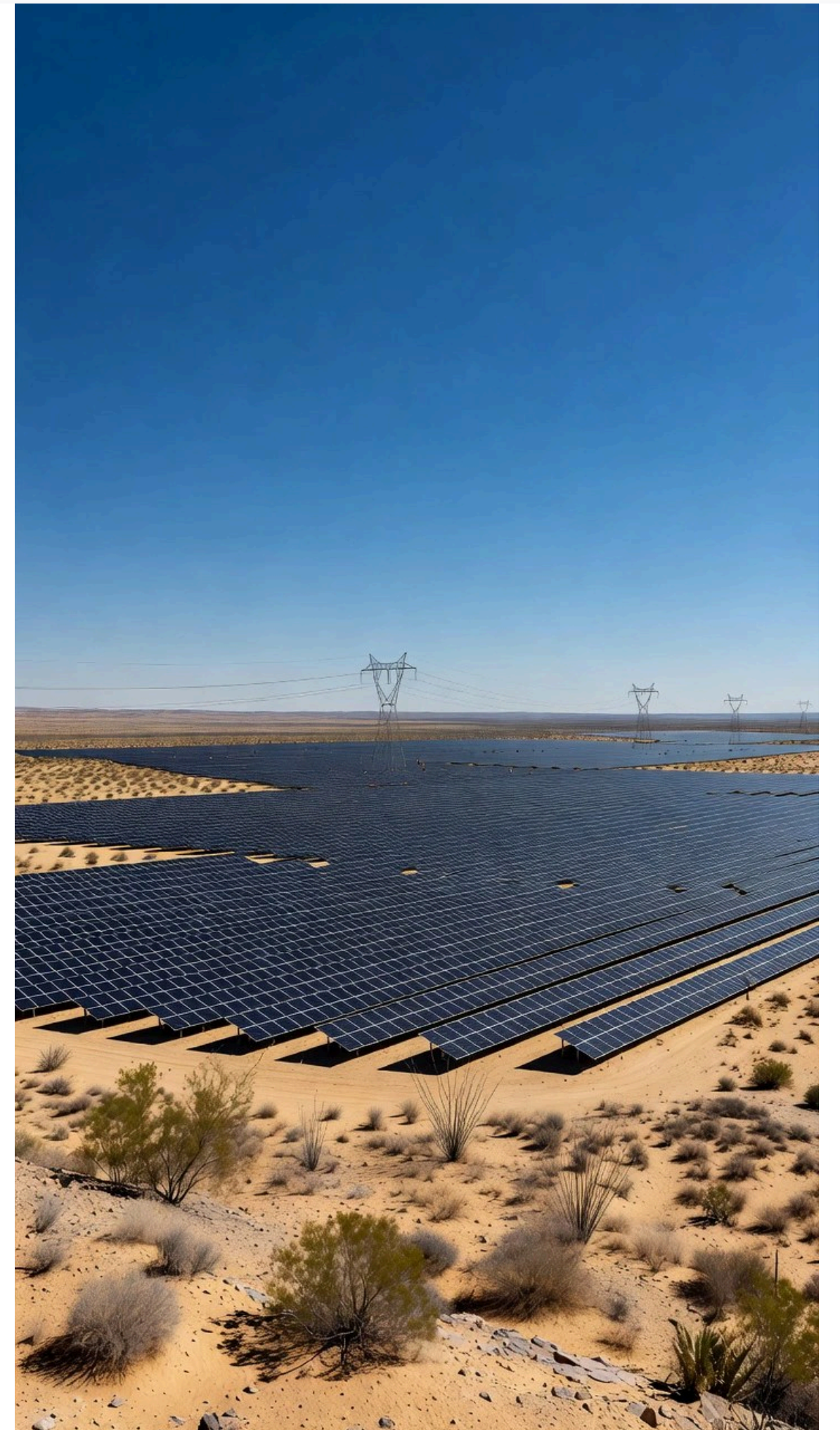
Texas accounts for 40% of planned U.S. utility-scale solar additions in 2026.

Start the solar market scan in Texas.

Arizona forms a meaningful second tier in solar additions

Arizona is planned to account for 6% of new U.S. utility-scale solar capacity in 2026.

Include Arizona in the next market-screening wave.



California matches Arizona's planned solar share

California is planned to receive 6% of new U.S. utility-scale solar capacity in 2026.

Assess California through an integrated solar-and-storage lens.



Michigan completes the leading four-state solar cluster

Four-state cluster.

Michigan represents 5% of planned U.S. utility-scale solar capacity additions in 2026.

Use Michigan to complete the initial solar scan.



PLANNED BATTERY STORAGE SHARE.

53%

Of 2026 U.S. battery storage is planned in Texas.

24 GW

PLANNED U.S. STORAGE
ADDITIONS.

80%

LOCATED ACROSS THREE STATES.

15 GW

ADDED DURING 2025.

Texas holds 12.9 GW of planned battery storage additions



Absolute scale.

Texas projects account for 12.9 GW of planned utility-scale battery storage in 2026.

Resource the first market assessment around Texas.

Large named projects reinforce Texas storage concentration

- **Lunis Creek BESS:** 621 MW in Jackson, Texas.
- **Clear Fork Creek:** 600 MW in Wilson, Texas.
- **Tehuacana Creek:** 418 MW in Navarro County.
- **Project mix:** Includes solar-plus-storage developments.

California is the second-largest planned storage market

California projects make up 14% of planned U.S. utility-scale battery storage capacity in 2026.

Make California the second priority after Texas.

Begin with concentrated markets.

Prioritize Texas first, then California and Arizona for detailed market review.