ESIG Spring Workshop

Opening Plenary Session: Discussion on Large Loads – Challenges and Solutions
March 17, 2025

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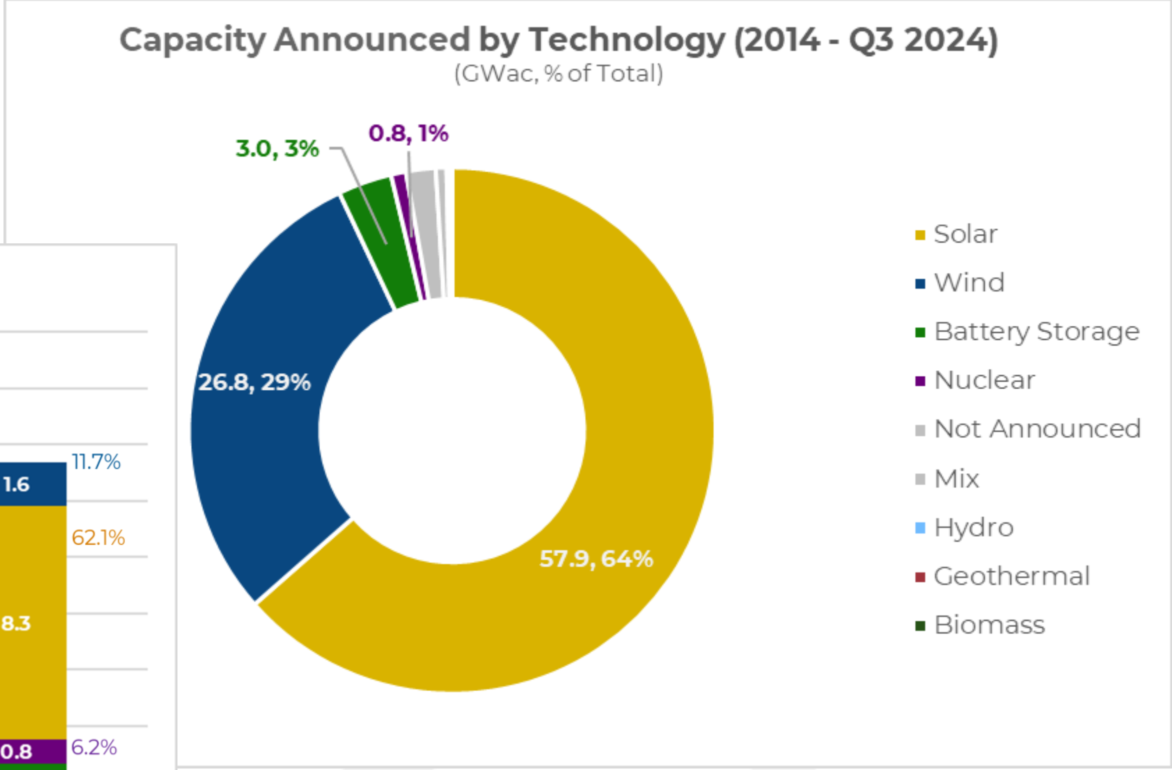
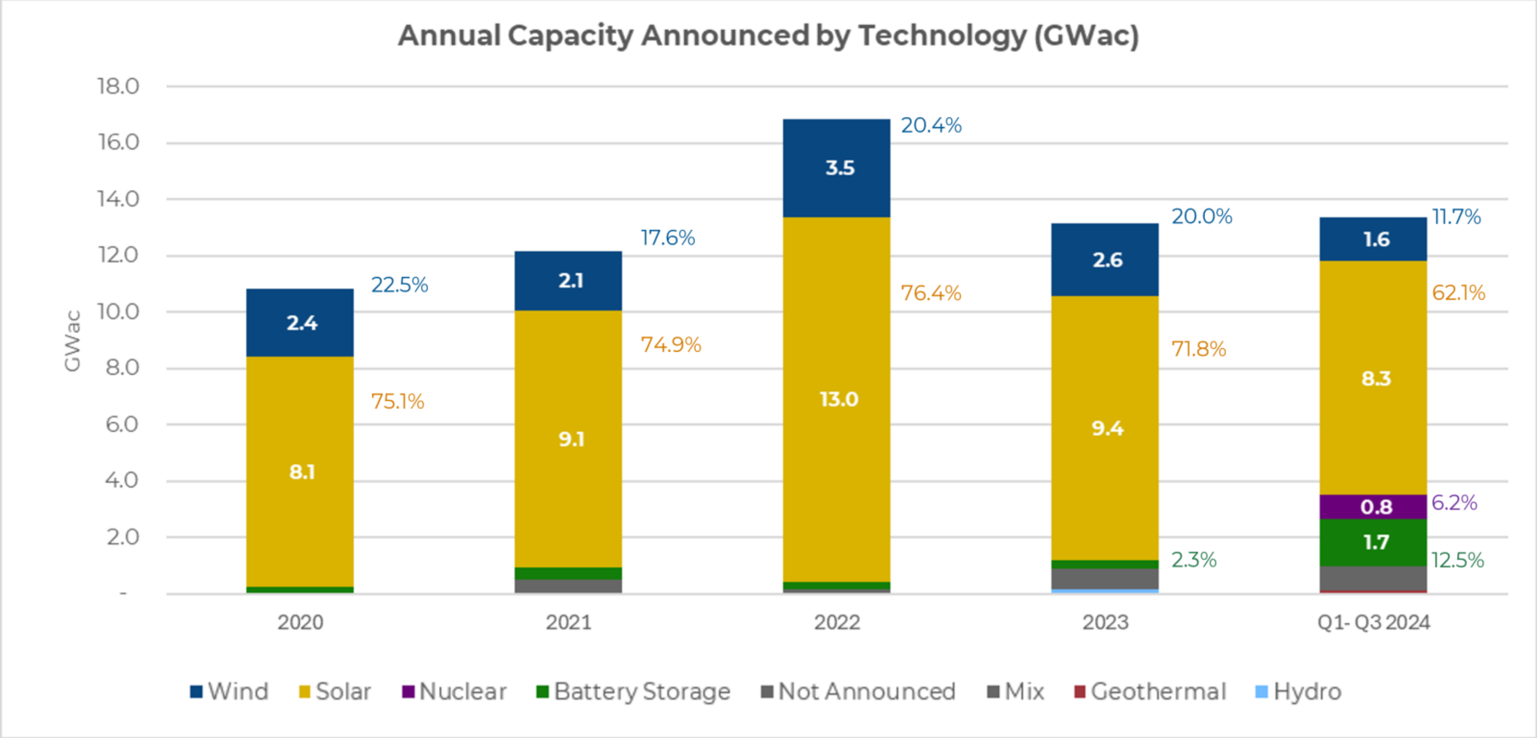
CEBA
Clean Energy Buyers Association

85+ GW of Corporate Carbon-emissions free procurement

Solar Continues to Dominate, Significant Growth in Nuclear and Battery Storage



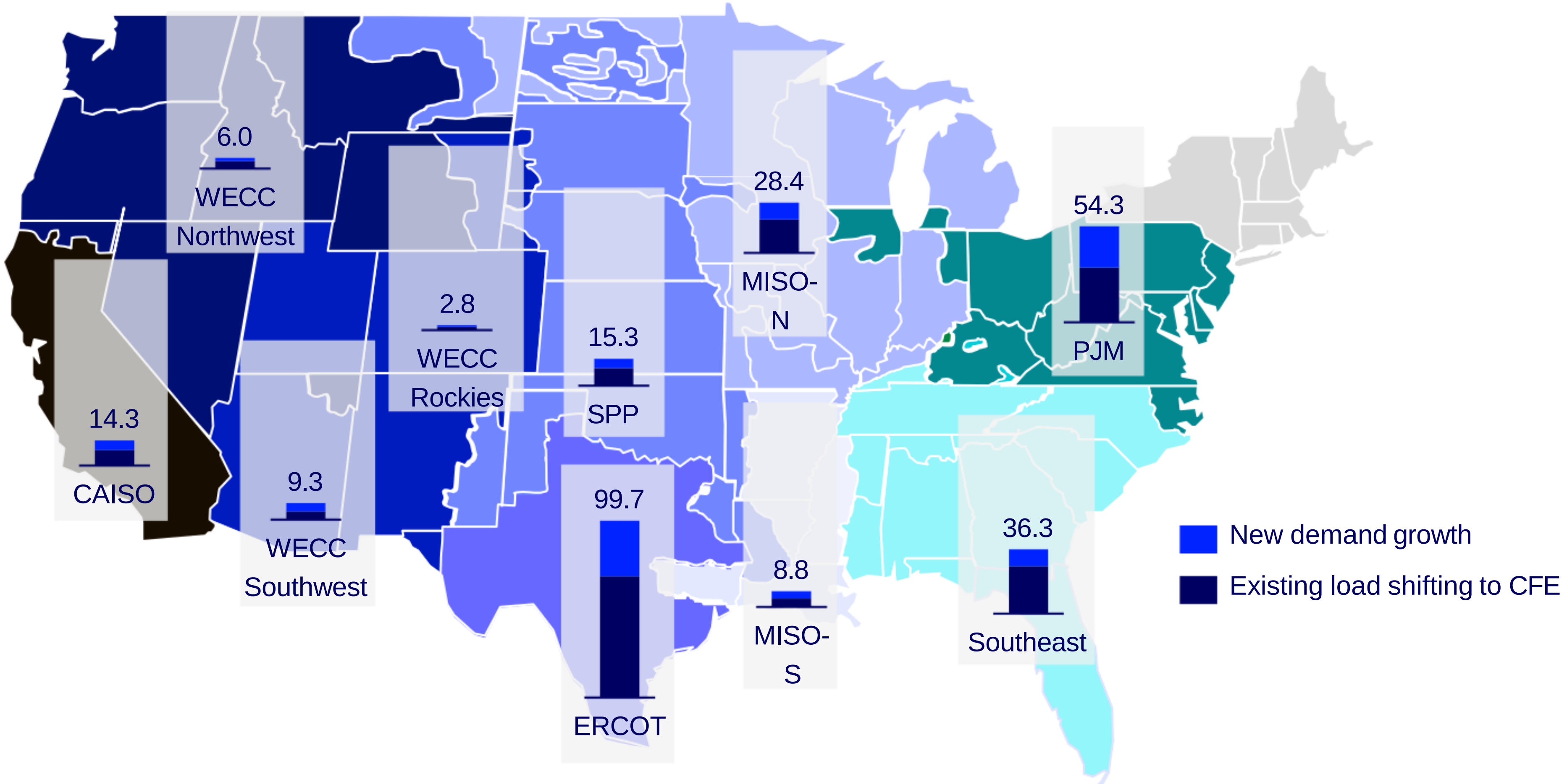


Source: CEBA Deal Tracker

By 2035, F1000 companies will demand a total of 275 GW of carbon-emissions free energy to achieve their publicly committed clean energy targets

Nearly 70% of total CFE needs is centered around ERCOT, MISO, and PJM, in line with historical PPA activity

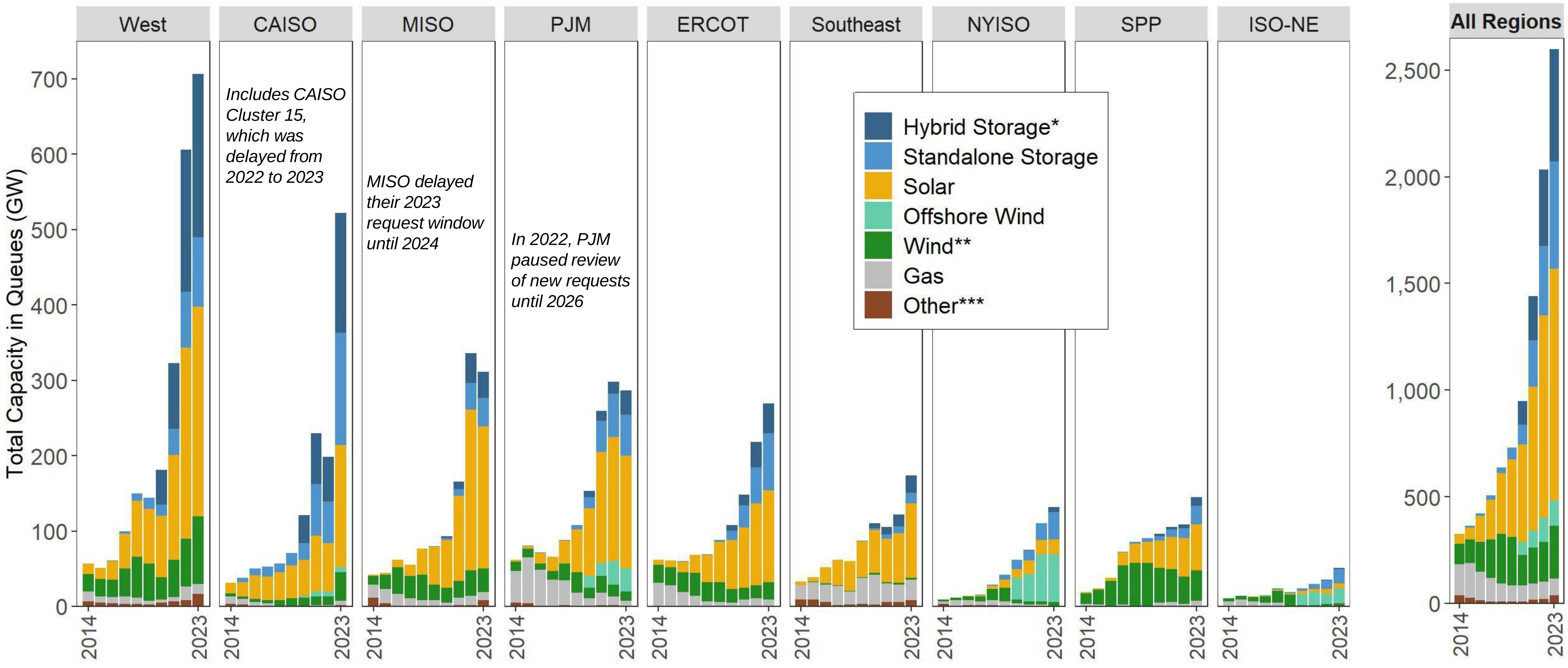
2035 Corporate Carbon-Emissions Free Demand by Region, GW



Wood Mackenzie

CEBA

Solar (1,086 GW) , Storage (1,028 GW), and Wind (366 GW) make up 95% of active capacity in queues, with 3% (79 GW) from Gas. Most solar and storage capacity is in hybrid plants



*Notes: (1) *Hybrid storage capacity is estimated for some projects using storage:generator ratios from projects that provide separate capacity data, and that value is only included starting in 2020. Storage duration is not provided in interconnection queue data. (2) **Wind capacity includes onshore and offshore for all years, but offshore is only broken out starting in 2020. (3) ***Other in this chart includes Coal, Nuclear, Hydro, Geothermal, and Other / Unknown. (4) Not all of this capacity will be built.*

(LBNL, Queued Up: Characteristics of Power Plants Seeking Transmission Interconnection, 2024)