SOUTHERN ALLIANCE FOR CLEAN ENERGY

SOLAR IN THE SOUTHEAST

NINTH EDITION

Southern Alliance for Clean Energy

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NINTH EDITION

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ABOUT SOUTHERN ALLIANCE FOR CLEAN ENERGY

The Southern Alliance for Clean Energy (SACE) is a nonprofit organization that promotes responsible and equitable energy choices to ensure clean, safe and healthy communities throughout the Southeast. As a leading voice for energy policy in our region, SACE is focused on transforming the way we produce and consume energy in the Southeast.

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INTRODUCTION

SACE's "Solar in the Southeast" report sheds light on the critical role that utilities, policymakers, and customers have in the growing solar market in the Southeast. Utilities in Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina, and Tennessee operate as monopolies and are granted the responsibility and control over power supplies. Consequently, the location of a home or business is the primary determinant not only of which utility will supply the electricity but also the amount of solar within the resource portfolio that generates electricity for that home or business.

As a regional organization, SACE tracks and compiles information from electric utility integrated resource plans (IRPs) that some utilities file with state-level regulators. These resource plans, along with U.S. Energy Information Administration (EIA) data on currently operating and planned utility-scale solar and distributed solar reported by utilities, are used to produce near-term forecasts for total installed capacity of solar power (in megawatts, MW) for the entire region out to 2030 based on current utility plans and state policies. We look at how each utility contributes to regional progress by documenting what portion of existing and planned capacity comes from solar. Additionally, SACE looks at how each utility has increased the pace of solar additions over time to track progress for their respective portfolio, thus illustrating the amount of solar power sourced to a utility or state relative to the size of their generation fleet.

The purpose of this report is to document current progress and trends at both utility and state levels, as well as identify policies and practices to drive continued solar growth in the Southeast. This Ninth Edition report is an update to the Eighth Edition Report, published October 28, 2025.

EXECUTIVE SUMMARY

SOLAR PROGRESS ACROSS THE SOUTHEAST

The Southeast reached a cumulative 30 gigawatts (GW) of solar in 2025 despite total additions dropping from approximately 5 GW in 2024 to just under 3 GW in 2025. The vast majority of that solar is utility-scale, or large solar farms owned by or contracted to electric utilities. While Florida Power & Light (FPL) slowed deployment from 2 GW in 2024 to 1 GW in 2025, it plans to continue installing at a steady pace in the near-term, forecasting just under 1 GW of additional solar in 2026 and 1.2 GW in 2027. Georgia Power deployed over 100 MW in 2025 thus reaching a cumulative 3.6 GW of solar capacity on its system. If current plans keep steady, the Southeast is on track to nearly double the amount of solar in the region to almost 54 GW in 2030. Political and policy headwinds could slow deployment.

LOAD GROWTH LEADS TO INTEREST IN BATTERIES

Solar's critics are quick to point out that the sun doesn't shine all the time. However, **there is little as reliable on planet Earth as the fact that the sun is going to rise each morning and set each day**. Operating an electric grid with solar is different, but not less reliable, than operating a grid with fossil fuels that must be transported via pipelines or rail. One tool that many utilities are using to complement solar on the grid is storing excess solar generated electricity in batteries and deploying that electricity when it is needed. Utilities across the region are forecasting significant demand for the first time in over a decade. Solar, often paired with batteries, are the fastest and least-risky way to meet forecasted load growth.

SOLAR KEEPS BILLS AFFORDABLE

With affordability top of mind as utilities forecast load growth, it is more important than ever for utilities to utilize solar. Despite rollbacks of tax credits, solar remains cost-competitive as costs associated with fossil fuel infrastructure trend upward. Since fuel costs are passed directly on to customers, solar is a low-cost way to stabilize customer utility bills by reducing their exposure to spikes in coal and gas prices.

STATE PROFILE HIGHLIGHTS

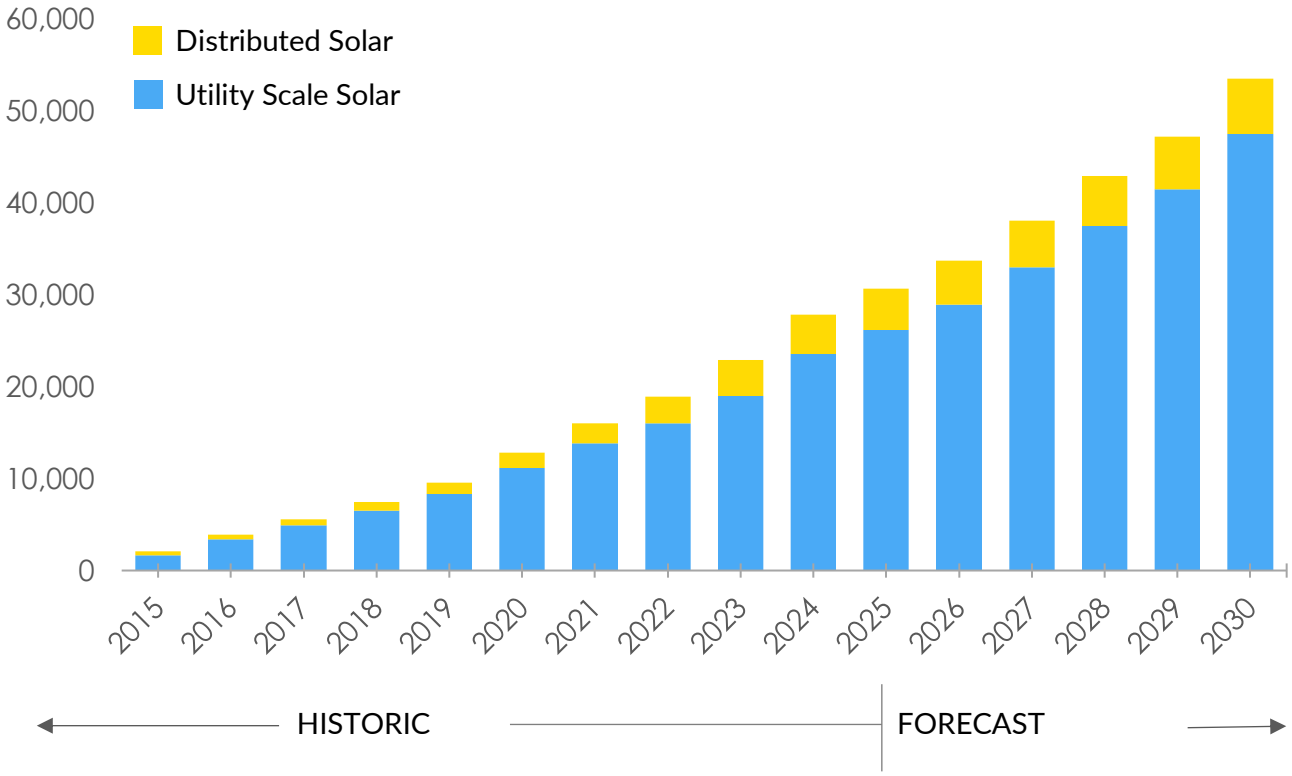
Florida remains the state with the most installed solar capacity in the Southeast, reaching over 15 GW in 2025 and expected to grow to over 30 GW by 2030. **North Carolina**, **Georgia**, and **South Carolina** follow, in that order, driven largely by utility-scale solar additions from a few major utilities. **Tennessee, Alabama, and Mississippi** lag compared to the rest of the region, at least in part due to the Tennessee Valley Authority (TVA)'s low solar additions to date.

SUNRISER UTILITIES

Several electric utilities across the Southeast have made larger capacity deployments in shorter time frames than ever. In past reports, we have awarded the title of Sunrisers to utilities that were expanding ambition on solar in the coming years. In this current environment, with many utilities pulling back on solar plans, the utilities that are standing out in the region on solar are those that are sticking with previous plans. Three Florida utilities, **FPL**, **Duke Energy Florida (DEF)**, and **Tampa Electric** all forecast more than half of all new additions will be from solar between now and 2030.

REGIONAL TRENDS – CAPACITY FORECAST

TOTAL SOUTHEAST SOLAR PHOTOVOLTAIC (PV) CAPACITY (MW) BY PROJECT TYPE



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

SOLAR ADDITIONS SLOWED IN 2025

Solar can be added to the grid by electric utilities, independent power producers, and consumers. Larger solar projects are called utility-scale solar, and they are typically owned by the electric utility or a non-utility developer who sells the solar power output to utilities. Distributed solar is made up of smaller solar systems that are typically installed on the rooftops of residential or commercial customers. Altogether, the Southeast was able to install an estimated 30,700 megawatts (MW) of solar as of 2025. After adding almost 4 GW in 2023 and almost 5 GW in 2024, solar additions across the region dropped in 2025 to under 3 GW, a level not seen since before 2020. Current utility plans show that pace picking up in 2026 and increasing through 2030, but will that hold?

ELECTRIC UTILITY PLANS AND PROCUREMENTS POWER THE REGION

The majority of solar in the Southeast comes from utility-scale solar projects, which are added to the grid through two major avenues: utilities determine the mix of resources to meet load (including load growth) in an Integrated Resource Plan (IRP) that leads a utility to build its own solar or procure solar through a Request for Proposals (RFP), or utilities go directly to an RFP to assess and procure resources, including solar. RFPs can be targeted, i.e. separate procurements for solar, gas, and batteries, or "all-source," where generation resources compete to meet a utility's need. In this report, we attribute the solar capacity to the utility whose electricity needs are being met by the solar generation, regardless of where the solar project is physically located.

REGIONAL TRENDS - DRIVERS OF SOLAR

PLUG-IN SOLAR

Plug-in solar is a technology that is emerging in the United States. With plug-in solar a consumer can purchase solar panels and plug them into an outside outlet to enable the use of this generated solar in their home or business. Plug-in solar, also known as balcony solar, is more widespread in Europe. Some utilities have expressed concern about the safety of these systems to lineworkers and buildings. UL Solutions (UL) is working on a standard, UL 3700, for these systems, and SACE has published a whitepaper, *Disproportionate Regulation of Residential Plug-in Solar*, that outlines plug-in solar is a technology with zero documented lineworker deaths from a properly configured plug-in system that faces heavier regulation than portable generators.

In addition to these safety concerns, many states have legislation in process to allow these systems to be installed without the need for an interconnection agreement with the utility, a process that adds time and expense. As of June 2026, legislators in 35 states plus Washington, D.C. have introduced plug-in solar bills. Nine states, Colorado, Connecticut, Maine, Maryland, New Hampshire, New York, Utah, Vermont, and Virginia have passed legislation. In the Southeast, North Carolina has active legislation and South Carolina and Georgia have legislation that has been deferred. SACE is a plug-in solar subject matter expert in the Southeast and is working with some of TVA's local power companies on pilot programs to help advance this technology.

AGRIVOLTAICS

Agrivoltaics incorporate solar generation into agricultural land use. This, in essence, is a dual use of land and a counter to solar opponents who are concerned with the potential for loss of farmland. Agrivoltaics can co-locate solar with different types of agriculture, including grazing, cropping, and pollinators. SACE has launched an initiative to educate Southeast farmers and policymakers about agrivoltaics. We have published articles and hosted an Agrivoltaics 101 webinar. Agrivoltaics is gaining traction in the Southeast with small farmers, university research, solar developers, and more stakeholders becoming involved. Working with these partners, we are providing factual information to counter misinformation by entities that are opposed to clean solar power. SACE supports agrivoltaics from small to utility scale.

LOAD GROWTH & BATTERY ENERGY STORAGE

Utilities are increasing load forecasts and forecasting generation capacity needs due to increased manufacturing and data centers looking to locate in the Southeast. Solar is a low-cost method to increase generation capacity to address this need. To realize this need, new thinking is needed. An area often overlooked is how customers can aid in reducing consumption during peak demand periods, either by responding to utility signals or by using their own battery or solar and battery systems.

Utilities across the region have increased load forecasts in response to data centers looking to interconnect and draw huge amounts of power from the grid. Conversations around cost containment, avoiding stranded assets, protecting existing ratepayers, and meeting data center needs quickly and cleanly are ongoing. As utilities require more firmness from prospective data center developers, some of the uncertainty inherent in these utility load forecasts can be mitigated. However, risks of data center customers backing out, purchasing less power than forecast, or leaving after a few years will remain. Solar, especially paired with battery storage, is a natural low-risk source to deploy to meet this load growth. Unfortunately, many utilities across the Southeast are building more new gas power plants instead of solar to meet load growth, putting huge cost risks on existing customers.

Utility-scale battery storage allows energy to be stored while it is being generated and then discharged back to the grid later. Many battery storage projects can charge from a mix of grid resources rather than just solar. These systems can still help integrate solar more easily since they can ensure a constant level of power is delivered from solar, they ramp up and down faster than gas power plants, and they can be used to prevent curtailment when solar is producing more energy than needed. Additionally, though the "One Big Beautiful Bill" (OBBB) terminated solar tax credits, it left the battery tax credit in place, so we expect to see more storage in the Southeast.

FEDERAL POLICY UPDATE

The OBBB is impacting the solar industry, including in the Southeast. The bill cut the Solar for All program, which would have expanded access to solar solutions like rooftop solar and community solar for all communities regardless of location, income, and housing type. The U.S. Environmental Protection Agency terminated the Solar for All program on August 7, 2025. Programs within the Southeast have been terminated, but a few, such as Groundswell, are looking at alternative ways to fund the plans that were developed through Solar for All.

The OBBB also terminated tax credits for solar. The lack of solar tax credits will affect residential and commercial projects in the near term and utility-scale projects in the mid-term. Solar installations increased considerably in 2025 in anticipation of the residential/commercial credits terminating at the end of the year. Additionally, as a result of tax credit termination, utility IRPs are showing a pullback in solar.

UTILITY TRENDS – SOLAR IN IRPS

Utilities are building a variety of new resources in response to load growth, including solar. Some are also delaying the retirement of coal plants. Generally, the mix of new resources being built has been a mix of gas, battery storage, and solar.

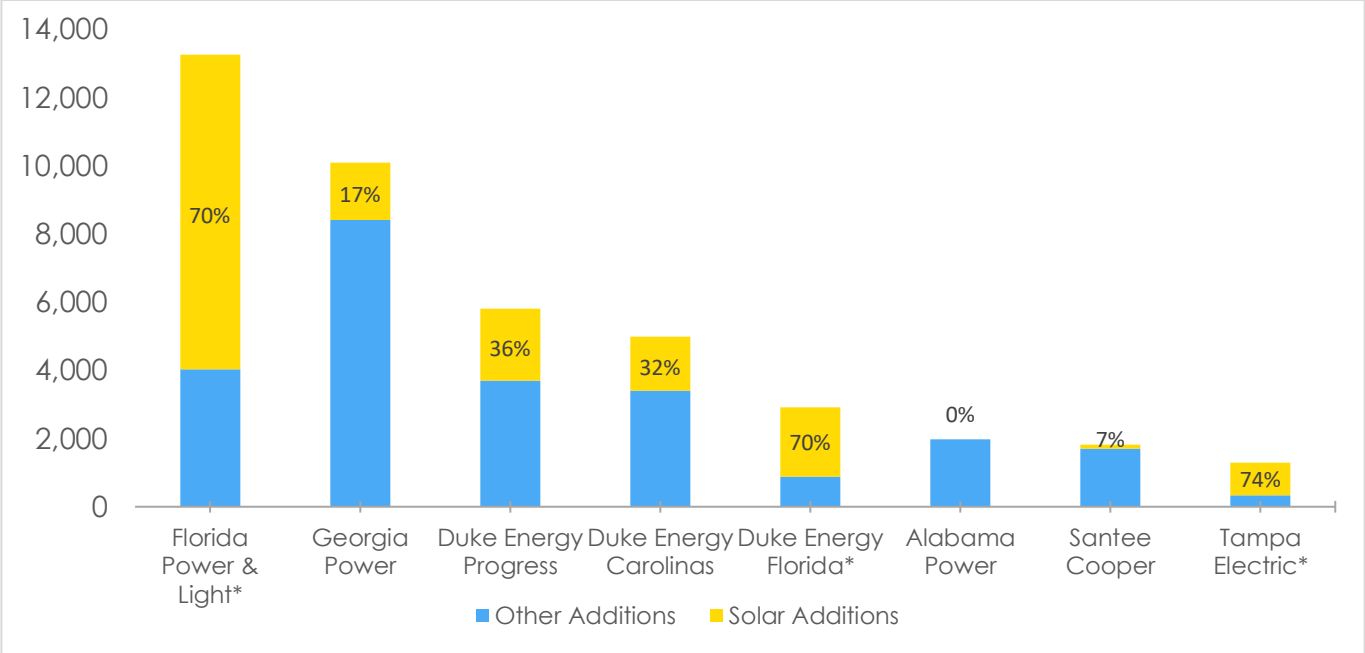
RESOURCE PLAN CAPACITY ADDITIONS (MW) THROUGH 2030, BY SOLAR PERCENTAGE

Utility	IRP Year	Total Additions (Nameplate MW)	Solar Additions (Nameplate MW)	Percent Solar
Tampa Electric*	2026	1,289	954	74%
Florida Power & Light *	2026	13,265	9,238	70%
Duke Energy Florida*	2026	2,933	2,022	70%
Duke Energy Progress	2025	5,802	2,110	36%
Duke Energy Carolinas	2025	4,987	1,591	32%
Georgia Power	2025	10,098	1,690	17%
Santee Cooper	2025	1,823	125	7%
Alabama Power	2025	1,973	0	0%
Mississippi Power	2027	0	0	0
Dominion Energy South Carolina	2026	0	0	0
TVA	Expected Aug. 2026	Unknown	Unknown	Unknown

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

**In Florida, there is no IRP requirement; utilities file a Ten-Year Site Plan each year*

RESOURCE PLAN CAPACITY ADDITIONS (MW) THROUGH 2030, BY TOTAL PLANNED ADDITIONS

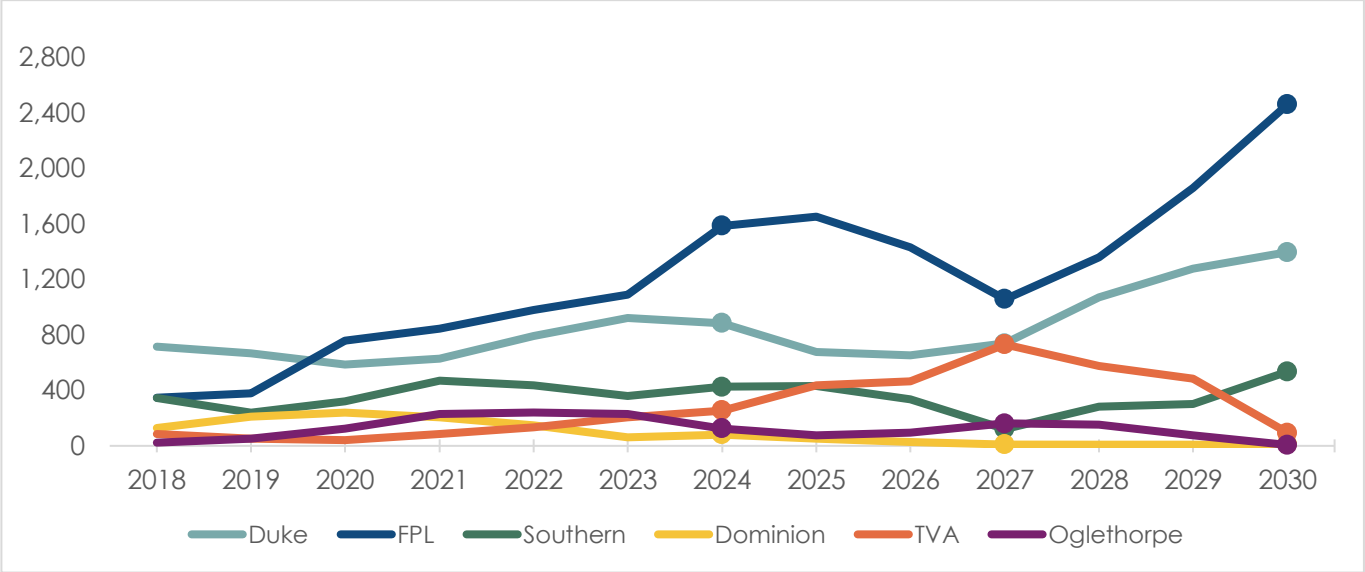


Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

Nationally, 51% of planned generation additions to the grid were solar in 2025, and 79% were solar or storage, according to the U.S. Energy Information Administration (EIA). In the Southeast, Tampa Electric, FPL, and DEF are above this national average for the next five years, with approximately 70% of planned additions coming from solar through 2030. There are also utilities falling far below the national average. For Georgia Power, Duke Energy Carolinas (DEC), and Duke Energy Progress (DEP), solar makes up less than half of additions, despite the fact that they are adding substantial solar, and driven by the fact that solar additions are eclipsed by non-solar, particularly new gas. Dominion Energy South Carolina (DESC) and Mississippi Power do not have any capacity additions over this timeframe, and TVA has not released an updated IRP since 2019, so they are not included in this comparison.

UTILITY TRENDS – PACE OF ADDITIONS

HISTORY OF INCREMENTAL SOLAR



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

3-YEAR AVERAGE OF INCREMENTAL SOLAR

Utility Company	2022-2024	2025-2027	2028-2030
Florida Power & Light	1,585	1,057	2,459
Duke Energy	885	737	1,395
Southern Company	425	122	534
Tampa Electric	288	216	200
TVA	255	731	94
Oglethorpe	124	162	7
Florida Municipals	107	280	482
Dominion Energy	82	9	11
Santee Cooper	71	45	4

By measuring the pace of incremental capacity additions from solar over a three-year period, we can see which utilities are speeding up and which are slowing down.

- **Florida Power & Light** has added an average of approximately 1,600 MW of solar / year for the last 3 years despite a slow down in additions in 2025. A group of **Florida Municipal Utilities** are also expected to continue making progress, reflecting a trend of both investor-owned *and* municipal utilities leading solar in the state.
- Meanwhile, **Santee Cooper and DESC** are among utilities actually slowing the pace of solar additions compared to both their historical pace and previously filed plans.

UTILITY PROFILES

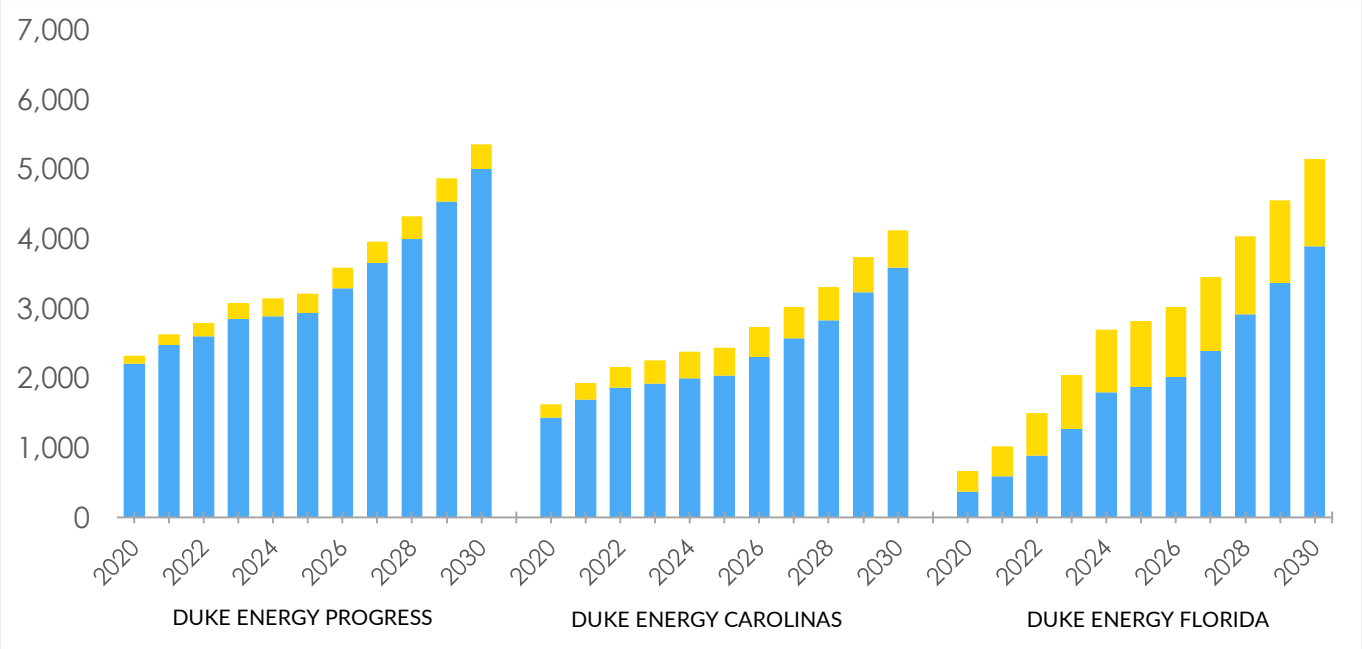
DUKE ENERGY

Duke Energy operates in three states that SACE tracks — North Carolina, South Carolina, and Florida. Duke Energy Carolinas (DEC) and Duke Energy Progress (DEP) both operate in the Carolinas. Duke Energy Florida (DEF) operates in Florida. They are all under the parent company, Duke Energy. DEC and DEP have filed with state regulators in the Carolinas to fully merge. The merger may have a minimal effect on near-term solar additions but could potentially reduce solar curtailment across the two systems over the longer term.

The solar programs offered to customers by Duke's utilities differ across its operating states. In the Carolinas, there is an annual request for proposal (RFP) process for utility-scale solar. Through the RFP, the utility procures utility-scale solar to meet its energy generation goals and needs. However, in Florida, the Solar Base Rate Adjustment (SoBRA) process allows DEF to rate base solar before it is built, leading to most solar being self-built. Duke Energy's two utilities in the Carolinas have an annual combined RFP process. The 2025 RFP is in process, and the 2026 RFP is currently paused.

On April 23, 2026, the North Carolina Utilities Commission's (NCUC) Chairman Brawley issued an order to pause DEC and DEP's 2026 RFP until after the NCUC finalizes an order in the Carbon Plan/Integrated Resource Plan (CPIRP). In response, the Carolinas Clean Energy Business Association filed a petition for reconsideration, and the Southern Environmental Law Center filed a motion for reconsideration on behalf of the Southern Alliance for Clean Energy, The Sierra Club, and Vote Solar. A pause in the RFP would lead to a gap in solar development in DEC and DEP in 2031. Additionally, it throws off the schedule to study any generation projects added to Duke's grid.

DUKE SOLAR CAPACITY (MW) BY UTILITY AND PROJECT TYPE



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

Duke's proposal in the ongoing CPIRP docket was filed in October 2025. It proposes less near-term solar than the previous CPIRP, but increasing most other resource types, including a doubling of battery storage.

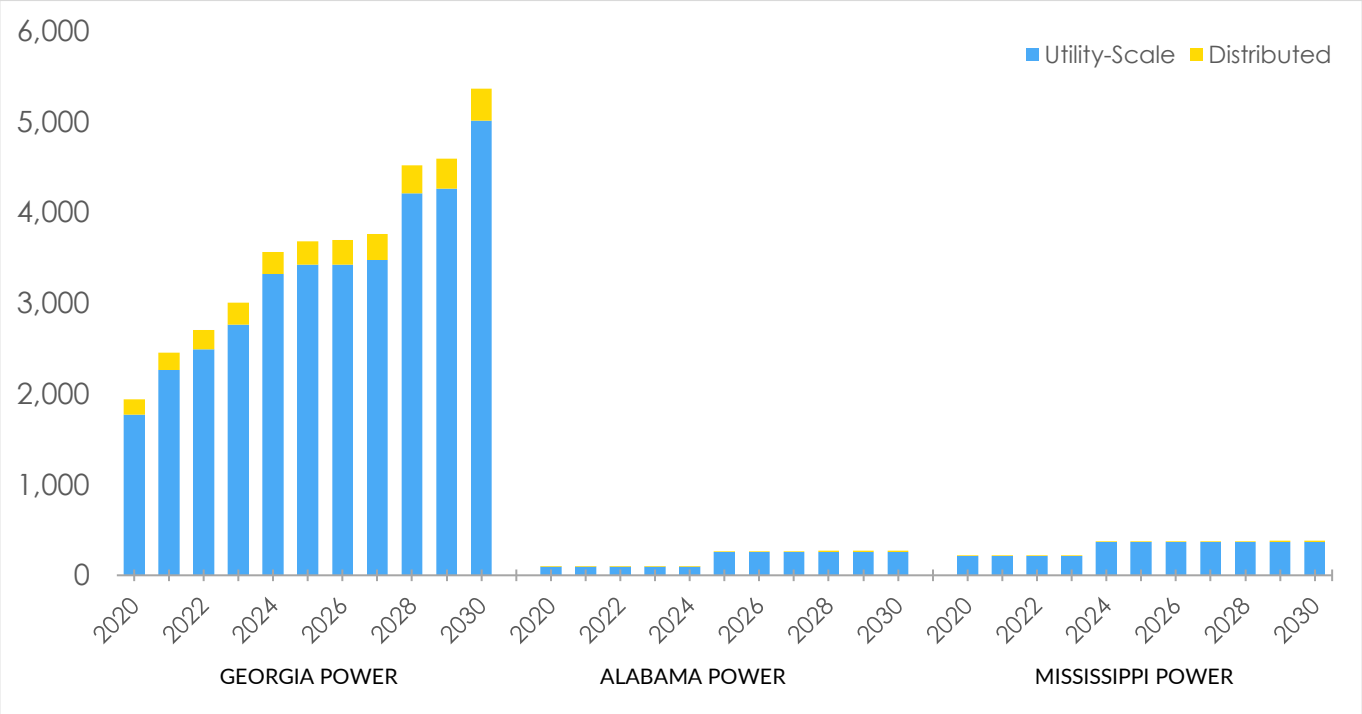
Despite its smaller size, DEF is on pace with Duke's utilities in the Carolinas on total solar additions and is outpacing the Carolina utilities on distributed solar. DEF has a successful community solar program. DEC and DEP proposed bringing a similar program to their customers in the Carolinas but ultimately pulled the program. The major flaw in the proposals in the Carolinas, called Clean Energy Connection, was a lack of "additionality." That means Duke would ask customers to pay more for solar without changing how much solar is ultimately on the grid. In addition, DEC and DEP also withdrew the Clean Energy Impact program, a renewable energy credit program for residential and small commercial customers. With these withdrawals, it raises the question does Duke have a coherent solar policy in the Carolinas?

DEC is still offering a residential pilot program called PowerPair to incentivize residential solar customers in North Carolina to install companion battery storage and participate in a demand response program. DEP's PowerPair pilot reached its cap in October 2025. The South Carolina Public Service Commission (PSC) has approved DEC and DEP's proposal for a non-residential version of PowerPair; a similar proposal is being considered in North Carolina.

SOUTHERN COMPANY

Southern Company has three electric operating companies, all located in the Southeast, in Alabama, Mississippi, and Georgia. Georgia Power, the largest of its operating companies, completed an IRP in 2025. Through the results of an RFP, Georgia Power found that the fastest way to get resources online is to add storage to existing solar locations. Despite this, Georgia Power is also moving forward with building several expensive new gas power plants.

SOUTHERN CO. SOLAR CAPACITY (MW) BY UTILITY & PROJECT TYPE



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

Also as a result of the IRP, Georgia Power has filed and been approved for Distributed Generation and Customer Identified Resource programs that allow commercial and industrial customers to have more flexibility in renewable generation access. Additionally, a virtual power plant pilot is scheduled to launch in Summer 2026.

Alabama Power doesn't shine quite as brightly as its sister operating companies. Although it has taken steps to build solar by getting approval from its regulators, there have been setbacks in recent projects. The Alabama Public Service Commission (PSC) initially approved 400 MW of renewable energy generation, which Alabama Power is still on track to build. Several 80 MW projects that have been reflected in past reports have been terminated, namely HEP Greenville in early 2024 and Notch 4 & 5 in July 2025. The PSC authorized up to 2,400 MW by 2029, but it is unclear how much of that upper limit the utility plans to pursue. It is encouraging to see a battery storage and renewable plus storage RFP that was issued in fall 2025. Projects are projected to be in service by December 1, 2032.

Mississippi Power is the smallest of Southern's operating companies and generally hasn't required much new capacity in recent years. Its latest IRP stated that it does not anticipate new capacity needs until 2041. Mississippi Power has undergone just two IRPs under Mississippi's PSC review since enacting its IRP rules, one in 2021 and another in 2024. The 2027 IRP is underway with a public meeting occurring in April 2026 indicating 600 MW of new load.

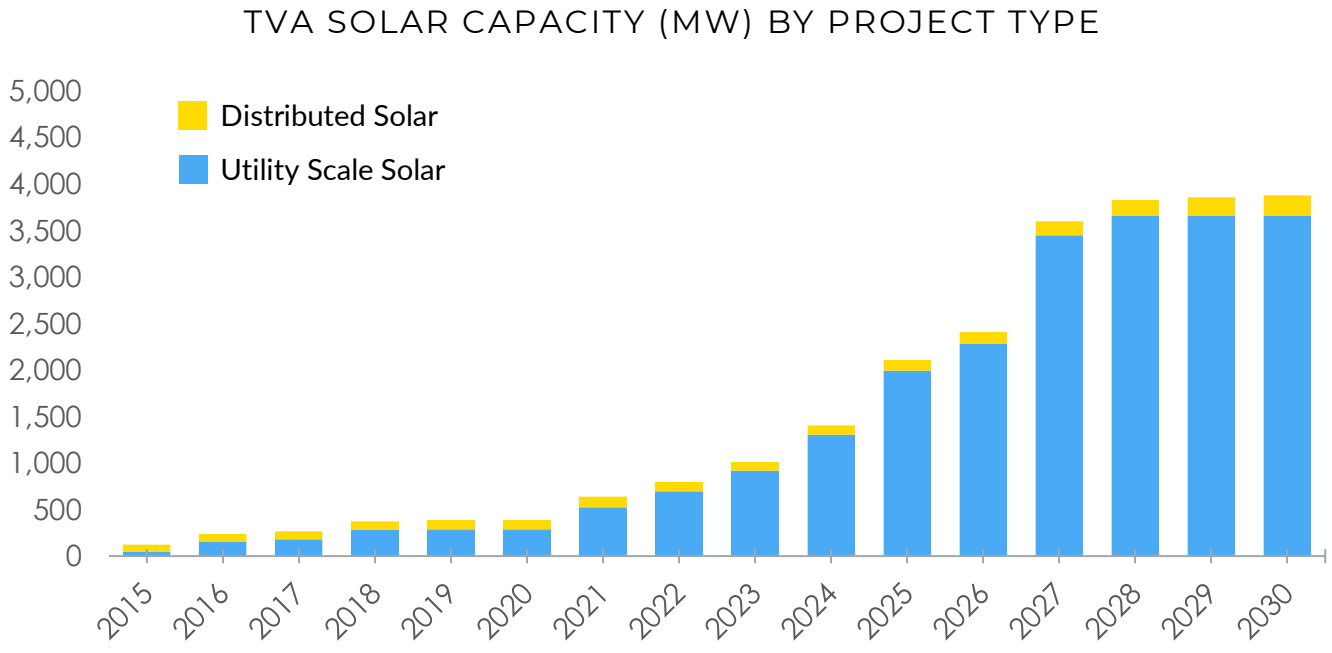
TENNESSEE VALLEY AUTHORITY (TVA)

The political turmoil complicating TVA's future, including its future with solar, continues into 2026 with a new CEO and new chair of the TVA Board. The federally-owned utility has not issued a new draft IRP since the fall of 2024 and is well past the five-year cadence under its current IRP that was approved by its Board of Directors in 2019. In 2025, President Trump fired three Biden-appointed Board Directors and nominated four new Directors to align with his agenda. The Board now has a majority of Trump-appointed Directors who have rolled back renewable and diversity initiatives and removed targeted coal retirement dates.

Absent direction on solar in an IRP, the main way to track solar additions to TVA's grid is through its RFP and generation interconnection process. Following the Federal Energy Regulatory Commission's (FERC) Order 2023, which directed changes in the interconnection process for new generation for all FERC-jurisdictional utilities, TVA voluntarily adapted most of the requirements of Order 2023 into a new process for procuring resources of all types, including solar and storage. Each year, TVA will hold a resource solicitation. The solicitation in 2025 was for projects in service by 2032, targeting up to 1,250 MW of gas, 500 MW of battery storage, and 500 MW of solar. The 2026 RFP was released on May 4 and only targets existing resources, so will not add new solar to TVA's grid.

In addition to contracting directly with TVA, many of TVA's distribution utility customers are adding solar. Beginning in 2019, when TVA restructured its contracts with these customers, commonly known as Local Power Companies or LPCs, TVA began to allow LPCs to self-own a small portion of their own generation for the first time ever. As of September 2025, as TVA stated in its latest annual report, 109 of the 153 LPCs served by TVA have signed a Power Supply Flexibility Agreement. A notable exception, Memphis Light Gas & Water (MLGW), the municipal utility that serves the city of Memphis and is TVA's largest customer, has not signed the 20-year evergreen contract or the Power Supply Flexibility Agreement with TVA, but is still moving forward with adding battery storage to its grid this year.

TVA has long been a laggard on solar in the Southeast. While some were hopeful a few years ago that that might change, it appears any shift is stalled at a level far less than the repeated commitments to deploy 10 GW of solar in public statements.

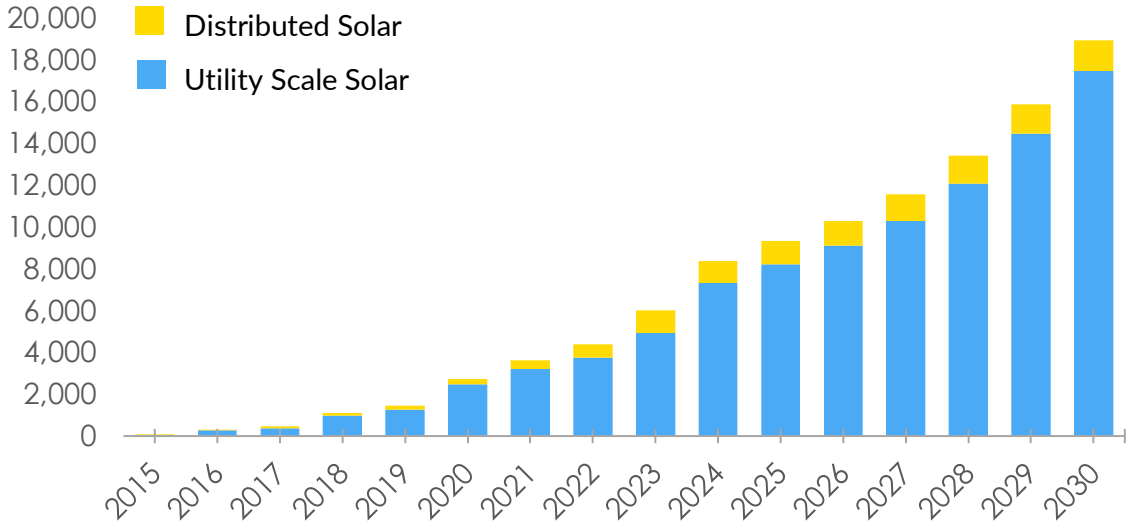


Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

FLORIDA POWER & LIGHT

FPL, long a leader on solar in the Southeast, maintains its near-term solar plans but is poised to pull back on that ambition in future years. Between now and 2031, FPL's plans add more solar per year than any other utility in the Southeast. FPL's parent company, NextEra, has announced a plan to merge with Dominion Energy; that announced merger proposal is discussed further in the section on Dominion Energy South Carolina.

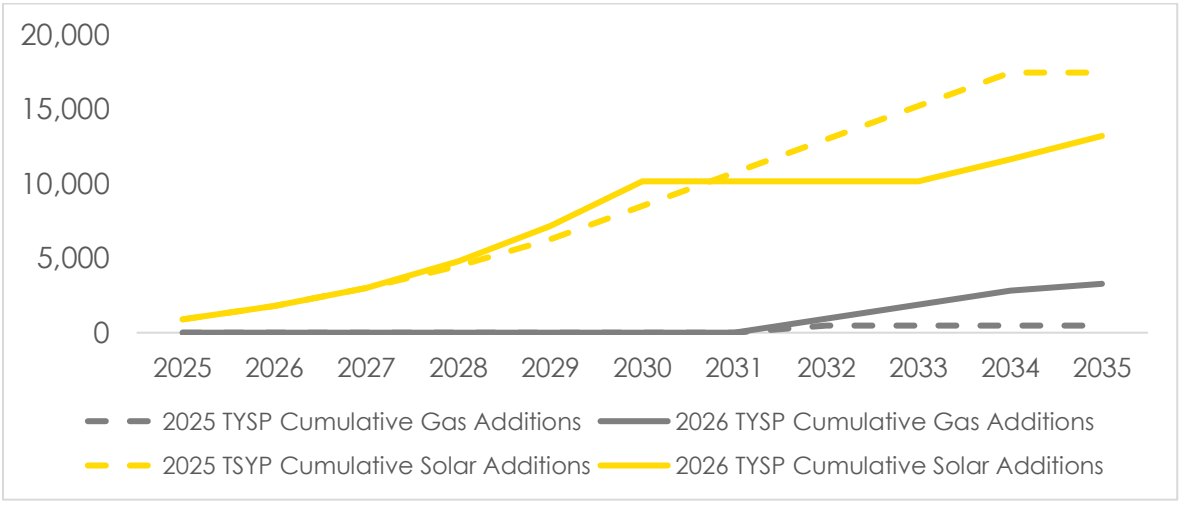
FPL SOLAR CAPACITY (MW) BY PROJECT TYPE



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

SOLAR (MW)	2025	2030
Distributed (MW)	1,130	1,486
Utility-Scale (MW)	8,206	17,444
Total Solar (MW)	9,336	18,930

COMPARISON OF SOLAR & GAS ADDITIONS IN FPL 2025 & 2026 PLANS



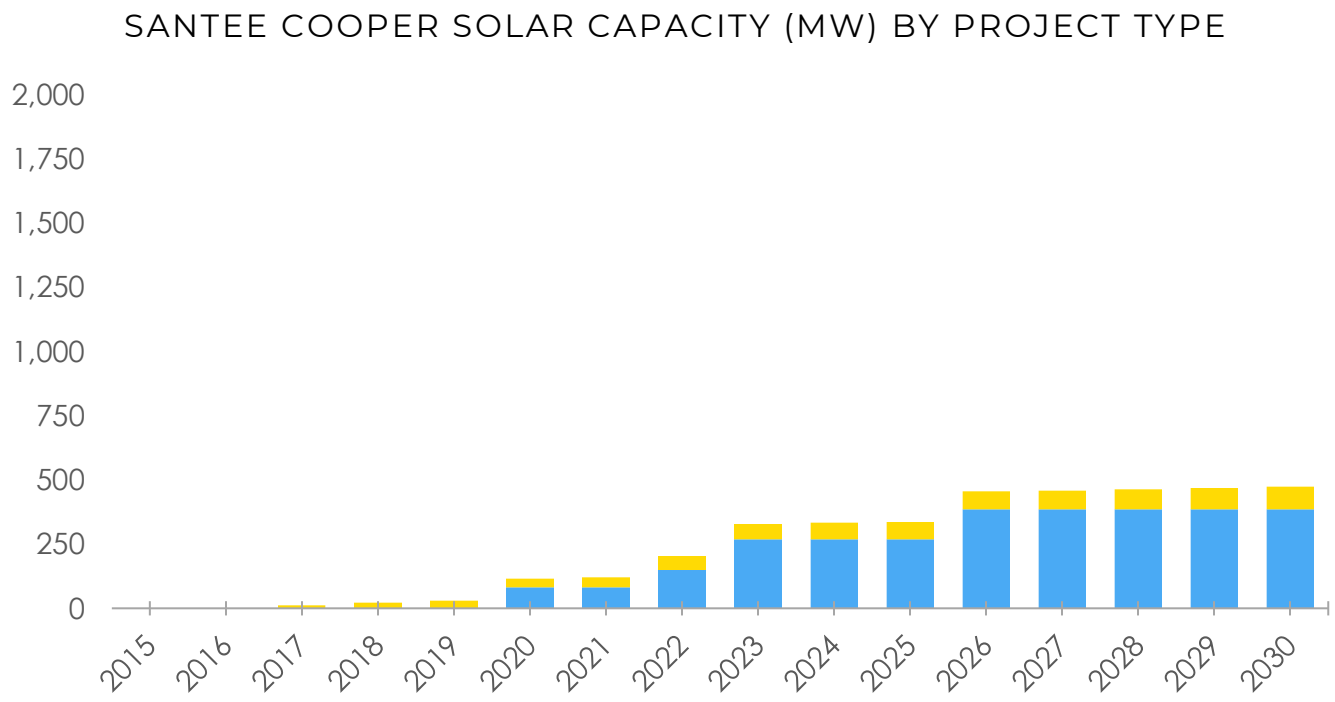
Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

FPL's latest resource plan, filed in April 2026, reduced the total amount of solar that FPL plans to build over the next 10 years compared to the plan that was filed in April 2025 by nearly 30% to just under 12,300 MW. The key difference between the two plans is that FPL plans to add zero solar in 2031-2033, driven by the expiration of tax credits for solar. Driven by that change is an increase in FPL's plans to add new gas, which went from 475 MW over the 10-year timeframe in the 2025 plan to over 3,200 MW in the 2026 plan. While not mentioned as a reason for the pullback in planned solar, NextEra, the parent company that owns FPL, abandoned its previous goal to reduce carbon emissions to zero by 2045.

SANTEE COOPER

On September 16, 2025, Santee Cooper filed its 2025 IRP Update. The 2025 Update adjusts base planning assumptions from the 2023 IRP and 2024 IRP Update, while also providing status updates on items from the short-term action plans. Santee Cooper notes that the differences between the 2023 Preferred Portfolio and the new 2025 Portfolio Update are primarily driven by higher load projections and an increase in solar costs, due to the accelerated termination of federal tax credits. Santee Cooper will file a full IRP later in 2026.

Although the Update states that it plans to build 2,000 MW of solar by 2052, there appears to be very little in the way of incremental solar in the timeframe of this report (through 2030). This is in direct contrast to the plan released in 2024 that included 1,800 MW of solar through 2031.



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

SOLAR (MW)	2025	2030
Distributed (MW)	67	88
Utility-Scale (MW)	270	384
Total Solar (MW)	337	473

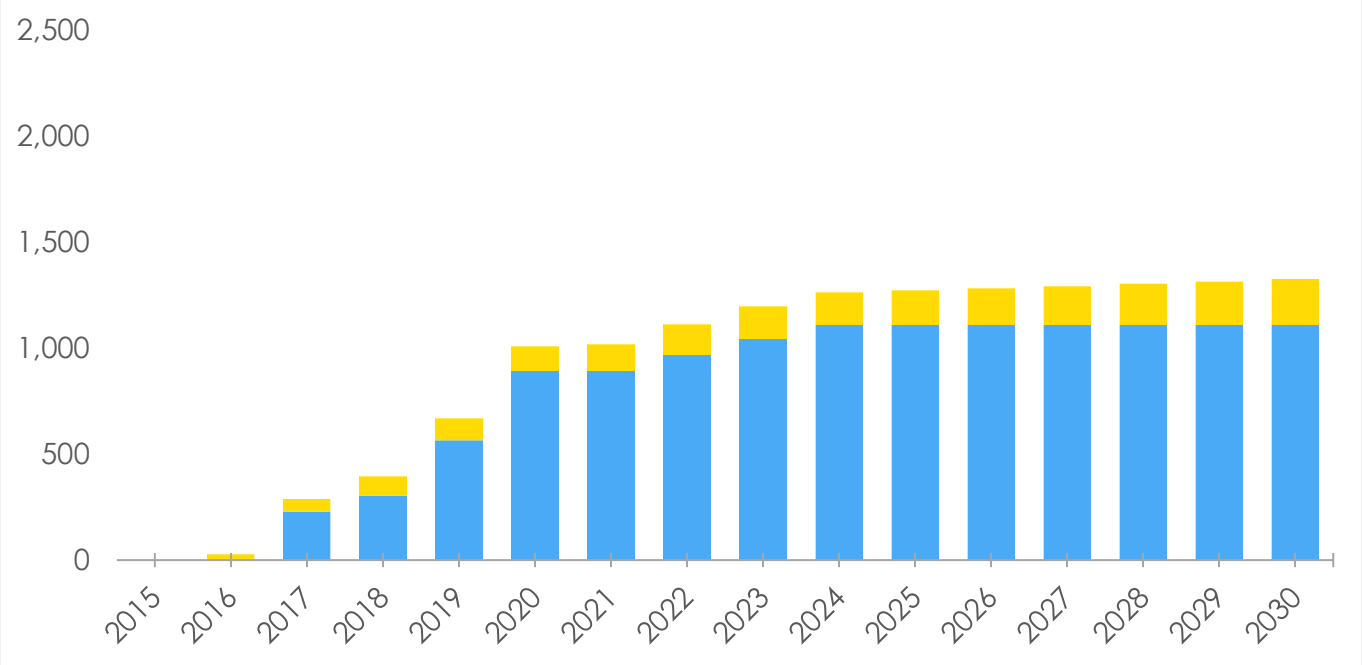
DOMINION ENERGY SOUTH CAROLINA

Dominion Energy South Carolina submitted an IRP in early 2026. This latest IRP proposal adds no incremental solar until 2031 (paired with energy storage) and does not add PV-only until 2042. This updated plan significantly reduces the amount of incremental solar over the planning horizon from 4.54 GW in the 2025 IRP update to 3 GW in the 2026 IRP. The new preferred plan also delays solar additions compared to previous plans, adding no solar or solar paired with storage between 2036 and 2041.

Instead of relying on solar and battery storage to reduce risk, Dominion Energy South Carolina has decided to reduce its plans for solar and storage, add gas, and extend the use of coal plants.

In May 2026, a proposal to merge NextEra and Dominion Energy was announced. This merger will affect North Carolina, South Carolina, and Virginia. The next step is regulatory approval nationally at the Federal Energy Regulatory Commission, and in each state Commission in North Carolina, South Carolina, and Virginia.

DOMINION ENERGY SOLAR CAPACITY (MW) BY PROJECT TYPE

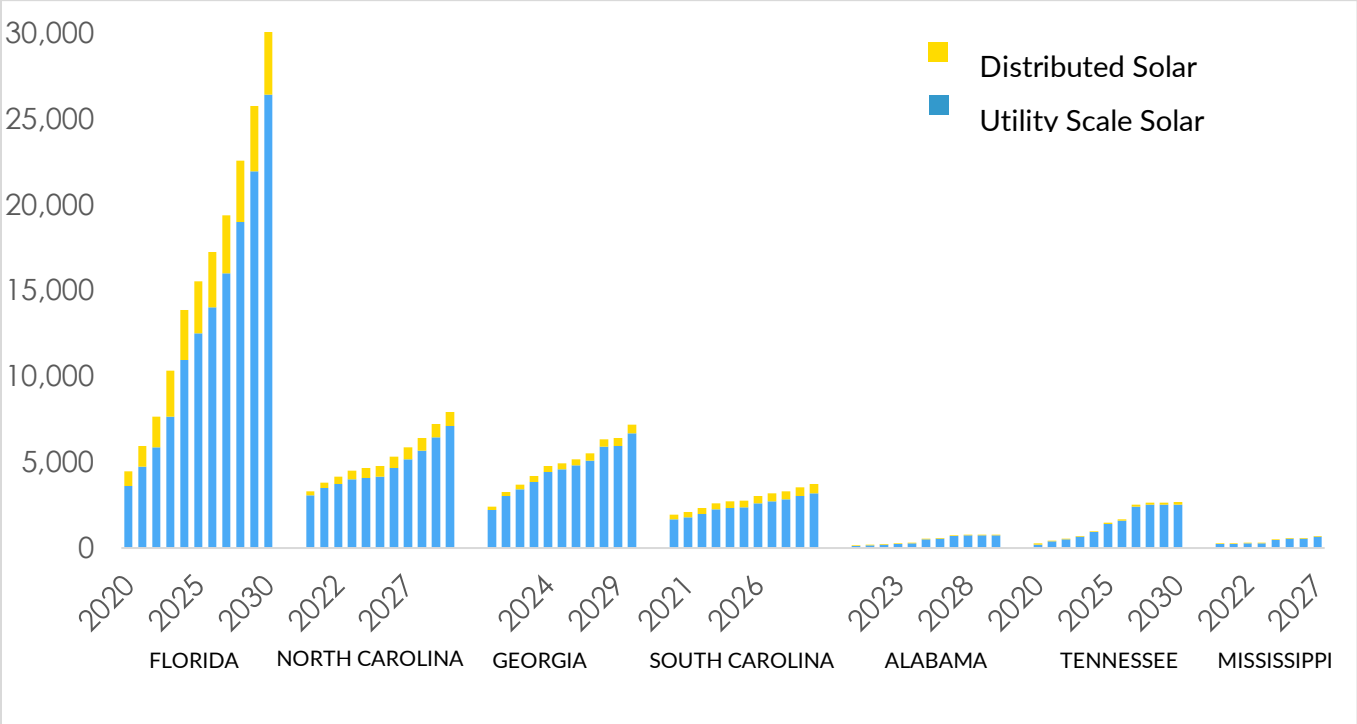


Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

SOLAR (MW)	2025	2030
Distributed (MW)	165	217
Utility-Scale (MW)	1,108	1,108
Total Solar (MW)	1,273	1,325

STATE TRENDS – CAPACITY FORECAST

SOLAR CAPACITY (MW) FORECAST BY STATE AND PROJECT TYPE



Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Report published June 2026.

Florida, the region's largest state, leads in total installed solar in the region. Cumulatively, Florida utilities are expected to reach approximately 15,500 MW of solar in 2025 and over 30,000 MW by 2030. Florida is also notably one of the only states to have a significant amount of capacity coming from distributed solar relative to the total capacity.

North Carolina dropped to third in the Southeast in installed solar capacity (MW) in 2025, barely behind Georgia, at approximately 4,700 MW and 4,900 MW respectively. But current utility plans indicate that North Carolina will retake its second-place spot by 2030.

Despite several utility-scale projects from TVA going into service, Alabama, Tennessee, and Mississippi still have a lot of catching up to do. Unfortunately, the slow solar growth from TVA and other utilities operating in these states makes it difficult to keep pace with the rest of the region.

For figures on Alabama and Tennessee solar capacity, please see page 14 for insights covering the Tennessee Valley Authority or consult Appendix C.

STATE PROFILES

FLORIDA: FIRST IN SOLAR

Florida recently crossed a threshold of 15,000 MW of solar capacity. True to its name, the Sunshine State has the most total installed solar capacity (MW) in the region, approximately 15,500 MW in 2025.

FLORIDA SOLAR CAPACITY (TOTAL MW) BY UTILITY

UTILITY	DISTRIBUTED MW		UTILITY-SCALE MW		TOTAL SOLAR MW	
	2025	2030	2025	2030	2025	2030
Florida Power & Light	1,130	1,486	8,206	17,444	9,336	18,930
Duke Energy Florida	951	1,251	1,868	3,890	2,819	5,141
Tampa Electric	391	514	1,500	2,454	1,891	2,968
Florida Municipals	334	439	551	2,228	885	2,667
Florida Cooperatives	224	295	364	364	588	659
Other Utilities	23	31	-	-	23	31
Total Florida	3,053	4,016	12,489	26,380	15,542	30,396

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

There are multiple noteworthy solar leaders in the state in addition to FPL, DEF, and Tampa Electric. Municipal utilities such as the Orlando Utilities Commission (OUC) and Jacksonville Electric Authority (JEA) have contributed to the state's capacity due to their leadership in the Florida Municipal Solar Project, a partnership of Florida public power utilities that pursue utility-scale solar.

Distributed solar is another bright spot in Florida, showing much higher growth than in other states. This is at least partially attributable to solar leasing, since sharp increases were observed each year for several years following approval of those programs in 2018. In particular, DEF has seen growth of rooftop solar in recent years.

2026 Ten Year Site Plans (TYSP) show JEA, FPL, DEF, and Tampa Electric reducing the amount of solar additions planned as compared to their 2025 TYSPs. Many utilities indicate this is due to solar tax credits sunsetting. This is not helping one of the most vulnerable states in the country for climate change.

GEORGIA: CONTINUED SURGE FROM DATA CENTERS

The main utility systems in the state of Georgia are the investor-owned utility Georgia Power, the cooperative utility Oglethorpe Power, and the federal utility TVA. While resource decisions and management of cooperative and municipal utilities in the state are left to their boards of directors. Georgia Power is the only utility that is regulated by the Georgia Public Service Commission (PSC), a five-person elected body that regulates utilities. Commissioners serve six-year terms and there were two new Commissioners elected in November 2025, Peter Hubbard for a one-year term and Dr. Alicia Johnson for a five-year term. There is another election in November 2026. Peter Hubbard is running again for a full six-year term, and Commissioner Tricia Pridemore's seat is up for grabs after she announced her retirement earlier this year.

GEORGIA SOLAR CAPACITY (TOTAL MW) BY UTILITY

UTILITY	DISTRIBUTED MW		UTILITY-SCALE MW		TOTAL SOLAR MW	
	2025	2030	2025	2030	2025	2030
Georgia Power	255	349	3,422	5,012	3,677	5,361
Oglethorpe Power	85	115	1,102	1,542	1,187	1,657
TVA	6	14	46	124	52	138
Georgia Municipals	5	6	7	7	12	13
Total Georgia	351	485	4,577	6,685	4,928	7,169

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

Even prior to recent data center developments in Georgia Power's service territory, some of Georgia's early solar development came from large-scale customers. For instance, Green Power EMC is a renewable energy provider to 38 electric membership cooperatives, including Walton EMC, which initially built a large amount of solar due to an agreement with Facebook (now Meta). Walton is part of the Oglethorpe Power system and a Green Power EMC affiliate, and has continued to expand well beyond the original project due to this partnership, with almost 300 MW expected to come online by 2028.

MISSISSIPPI: MODEST SOLAR

Mississippi is another one of the states in the Southeast that is regulated by a public service commission (PSC) that is elected, rather than appointed. There are three Commissioners who serve four-year terms, and the next election is scheduled for 2027. Mississippi is made up of multiple large investor-owned utilities, several cooperatives, and a small portion of the federal utility TVA. It is important to note that this report does not include utilities that participate in competitive markets, such as Mississippi's largest electric utility, Entergy Mississippi, which is a member of MISO.

MISSISSIPPI SOLAR CAPACITY (TOTAL MW) BY UTILITY

UTILITY	DISTRIBUTED MW		UTILITY-SCALE MW		TOTAL SOLAR MW	
	2025	2030	2025	2030	2025	2030
Mississippi Power	8	11	369	369	377	380
TVA	1	2	167	291	168	293
Mississippi Co-ops	3	4	-	-	3	4
Total Mississippi	12	17	536	660	548	677

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

Until recently, solar in Mississippi was primarily driven by the resource plans of the Tennessee Valley Authority, a federal utility headquartered in Tennessee that serves multiple states, including Mississippi. There are now several large additions attributable to Mississippi Power that make up the bulk of solar in the state, although the balance between TVA and Mississippi Power is expected to even up again in the near future.

Mississippi Power recently filed its second Integrated Resource Plan (IRP) in April 2024 and is in the process of finalizing its 2027 IRP. The utility did not forecast the need for new capacity additions, so there is not expected to be much of an increase in utility-scale solar. On the distributed side, Mississippi's net metering rules, which did not apply to the parts of the state served by TVA, were initially suspended by the Mississippi Public Service Commission in April 2024 along with several other solar programs. Following a legal battle challenging the suspension, the Commission decided to reinstate two of the distributed solar programs serving schools and low-income households in April 2025.

Note: This report does not cover the portion of Mississippi in the MISO territory served by Entergy Mississippi and Cooperative Energy, so it is not included in the state total or Southeast regional total.

NORTH CAROLINA: A CHALLENGING MOMENT

North Carolina set the stage early for large, statewide solar, building a robust solar industry in the state. State legislation, first to change solar procurement rules, then multiple changes to the makeup of the state Commission, and finally a rollback of carbon reduction targets, have all made solar development in North Carolina more difficult.

NORTH CAROLINA SOLAR CAPACITY (TOTAL MW) BY UTILITY

UTILITY	DISTRIBUTED MW		UTILITY-SCALE MW		TOTAL SOLAR MW	
	2025	2030	2025	2030	2025	2030
Duke Energy Progress	244	321	2,528	4,306	2,772	4,627
Duke Energy Carolinas	263	346	1,499	2,649	1,762	2,995
NC Electric Co-ops	69	89	63	63	132	152
NC Municipals	17	22	64	64	81	86
TVA	16	35	8	24	24	59
Total North Carolina	609	813	4,162	7,106	4,771	7,919

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

SACE apportions utility-scale solar generation to loads served across multi-state utility service territories. For example, many Duke Energy solar projects are physically located in North Carolina, but may have some capacity partially attributed to South Carolina in SACE's reporting since Duke serves load in both states. This report does not include the portion of the state in the PJM territory served by Dominion Energy.

Distributed solar in the state is growing somewhat modestly. The NCUC approved a Solar Choice Metering program that represents the next evolution of solar net metering that started October 1, 2023. The key feature is a time-of-use design that nets a solar customer's generation and consumption within those time-of-use periods.

Cooperative utilities in North Carolina have shown promise in the hybrid solar and storage space despite their overall solar capacity being modest compared to investor-owned utilities. North Carolina Electric Member Corporation is an example of this as it owns and operates many small battery energy storage projects that are paired with solar.

SOUTH CAROLINA: A NEW SOLAR TRAJECTORY?

There are three main utility systems in the state of South Carolina: Duke, Dominion, and the state-owned public utility Santee Cooper, which serves many cooperative utilities. These figures include both solar in Santee Cooper's own plan and the solar that Central Electric Cooperative, a customer of Santee Cooper, has commissioned directly.

SOUTH CAROLINA SOLAR CAPACITY (TOTAL MW) BY UTILITY

UTILITY	DISTRIBUTED MW		UTILITY-SCALE MW		TOTAL SOLAR MW	
	2025	2030	2025	2030	2025	2030
Dominion Energy SC	165	217	1,108	1,108	1,273	1,325
Duke Energy Carolinas	144	189	531	938	675	1,127
Duke Energy Progress	30	40	407	693	437	733
Santee Cooper	67	89	270	384	337	473
SC Municipals	7	8	36	47	43	55
Total South Carolina	413	543	2,352	3,170	2,765	3,713

Source: Southern Alliance for Clean Energy (SACE), "Solar in the Southeast" Ninth Edition Report published June 2026.

South Carolina passed a large energy bill during the 2025 legislative session, H.3309, on May 7, 2025. This legislation included several items that address renewable energy:

- Increasing the size limit on net metering
- Requiring utilities to issue requests for proposals to competitively procure renewable energy and storage to align with their approved integrated resource plans
- Authorizing the Public Service Commission to approve utility demand-side management programs that include customer renewable energy and energy storage
- Raising the statutory limit on the size of behind-the-meter (BTM) solar for commercial customers from 1 MW to 5 MW.

In January 2025, ES Foundry opened in Greenwood, SC. This facility produces U.S. made solar cells. Additionally, in August 2025, it was announced that a 100 MW solar facility will be built in Orangeburg, SC, to serve an Aiken, SC, Meta data center.

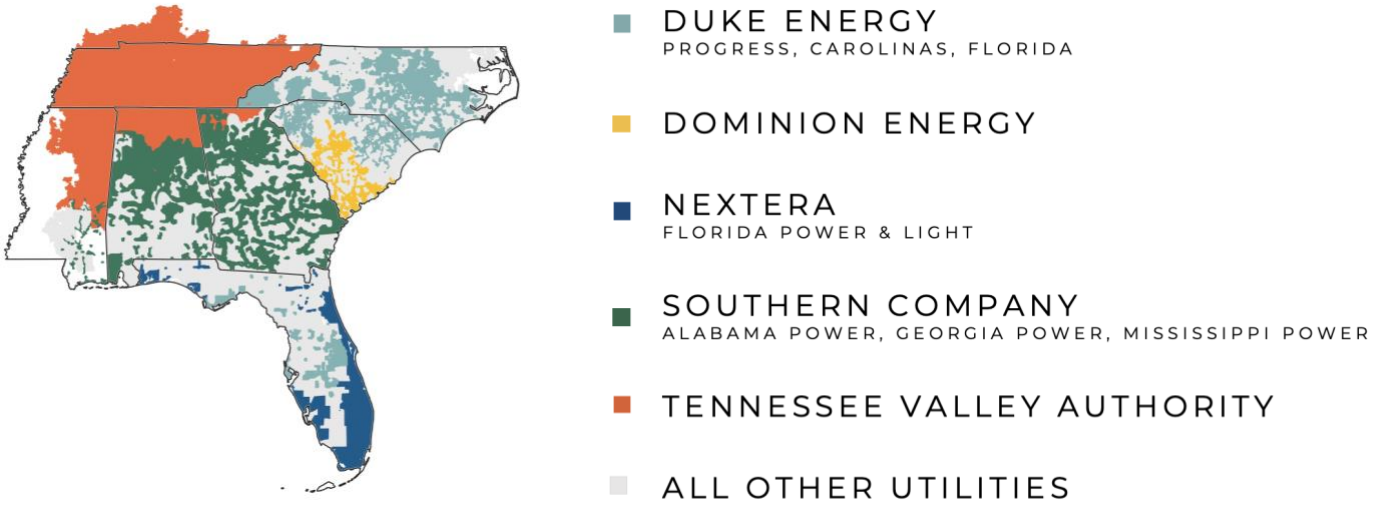
In 2026, the SC legislature elected two new Commissioners. How these new Commissioners will rule on solar issues is still an open question.

Utility IRPs are filed every three years in South Carolina, with 2026 being a year that all three major utilities will file an IRP. DESC has already filed; Duke and Santee Cooper will file later this year. All of these IRPs are expected to reduce solar plans in the state compared to previous plans.

APPENDICES

APPENDIX A: GEOGRAPHIC COVERAGE

The geographic coverage of data encompasses Southeastern utilities outside of the PJM/MISO regions. The states of Alabama, Florida, Georgia, and South Carolina are fully covered; relatively small portions of North Carolina and Tennessee are served by utilities that participate in PJM (thus while statewide reports for these states are relatively comprehensive, they may not align exactly with other data sources); only portions of Mississippi and Kentucky that are parts of TVA or the Southern Planning Area are included.



APPENDIX B: METHODS, DATA SOURCES, AND ASSUMPTIONS

Data Sources

U.S. Energy Information Administration (EIA) - the primary source for Southeastern capacity, project type, utility, technology, and operating date for plants and units are reported in the following:

- Forms EIA 860 (Annual Electric Generator Data) – 2024 – released September 9, 2025
- EIA 861 (Annual Electric Power Industry Report) – 2024 – released October 7, 2025

Utility integrated resource plans (IRPs) – EIA data is supplemented by utility resource plans, primarily through EQ Research's IRP as a Data Service for most major utilities, although solar capacity additions for some utilities that filed more recently are derived directly by SACE staff.

METHODS

Assigning solar capacity owned across multiple states or utility-cooperatives - SACE apportions utility-scale solar capacity (MW) according to the load that it serves. This helps give "credit" for solar in multi-state utility service territories, or among electric cooperative utilities. For example, a solar project in Alabama contracted to the Tennessee Valley Authority (TVA) will proportionally serve customers in multiple states across TVA service territory rather than just Alabama. Smaller, distributed generation systems are assumed to serve only their local load.

Reporting solar capacity in $MW_{(ac)}$ – All solar data is reported as nameplate capacity megawatts (MW) in alternating current (AC). Where applicable, data reported as $MW_{(dc)}$ is derated to $MW_{(ac)}$ equivalent, although AC reporting is becoming increasingly more common, particularly for utility-scale solar projects. We use 0.8256 as a conversion factor to change DC to AC.

Assigning solar contracts or solar not directly owned - In most cases, the owner and operator of the solar generator is reported on EIA-860. But in other cases, the utility that receives the generation from operating solar is not known or reported. The capacity can be assigned in a variety of ways. Some are assigned based on the plant's reported transmission or distribution system owner utility, while many others can be assigned or verified via FERC Form 556, utility resource plans, press releases, news articles, or information gathered from solar developers. The amount of solar capacity allocated to utilities in this manner is a small fraction of all Southeastern, but it can make up a substantial portion of the solar generation reported for utilities with small solar portfolios.

Future solar operating date - Future projections are informed by multiple datasets. SACE projects distributed generation solar (e.g., residential and commercial rooftop solar) independently for large utility systems based on the EIA Annual Energy Outlook. Smaller municipal and cooperative systems are projected at an aggregate level based on the averages for those systems. For utility-scale solar, SACE primarily uses planned capacity additions reported utility Integrated Resource Plans (IRPs). Some smaller utilities that do not regularly file resource plans might have future solar informed by interconnection queues, identified projects as well as utility announcements of ongoing and future plans, along with information gathered from solar developers to project planned solar.

APPENDIX C: SOUTHEAST UTILITY RESULTS

Appendix C is accessible on our website and contains distributed, utility-scale, and total solar capacity in megawatts (MW) for states and utilities across the region.

ADDITIONAL RESOURCES FROM SACE

The Southern Alliance for Clean Energy (SACE) releases several reports covering utility, clean energy, and transportation trends in the Southeast. We invite you to view all of our reports, white papers, and other clean energy resources and select reports below.

Energy Efficiency in the Southeast, *Seventh Edition Report. (2026)*

Tracking Decarbonization in the Southeast, *Fifth Edition Report. (2023)*

Transportation Electrification in the Southeast, *Sixth Annual Report. (2025)*

Disproportionate Regulation of Residential Plug-in Solar, *(2026)*

Agrivoltaics 101 Webinar, *(2026)*