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https://www.zacks.com/stock/news/2880743/green-etfs-to-watch-as-us-clean-power-adds-record-50gw-in-2025?q=pbw&art_rec=home-home-search_top_articles-ID01-txt-2880743

Green ETFs to Watch as US Clean Power Adds Record 50GW in 2025

The American Clean Power Association (ACP) released a blockbuster report on March 5, 2026. U.S. clean power installations surged to a record 50.3 gigawatts (GW) in 2025, reflecting a solid 3% rise from the prior year. This marks the first time annual deployment has crossed the 50 GW threshold, with solar, wind, and battery storage now accounting for over 90% of all new power capacity added to the U.S. grid.

For the past two years, the U.S. clean energy industry has navigated a "destitute condition," battered by unfavorable policy shifts and a pivot away from federal incentives that previously anchored renewable growth in the country.

Despite this hostile regulatory environment and the cooling of government support, this record-breaking installation data has thus thrust the industry back into the global spotlight, signaling a defiant resurgence.

Driving Forces Behind the Record Capacity Additions

The primary engine behind this 50 GW threshold last year was a massive acceleration in **electricity demand**, driven largely by the explosion of AI-integrated data centers and the broader electrification of the economy across diverse industries... and clean energy emerged as the fastest and most affordable solution to connect to the grid.

Furthermore, the 2025 boom reflects a "catch-up" period for projects that were previously snarled in supply chain bottlenecks.... this huge deployment boom has necessitated managing the intermittency of renewables, in making wind and solar more reliable. As a result, battery storage led the charge with a staggering 41% year-over-year jump in installations... and allowed the broader clean energy industry to integrate its record-breaking volume of new solar and wind generation into the grid seamlessly.

What Lies Ahead for Green Energy?

.. The sheer scale of newly operational assets—enough to power 6.9 million homes—is likely to generate solid revenues for renewable developers and project owners through long-term power purchase agreements or merchant market sales. Since high demand for power is keeping energy prices firm, clean energy developers and project owners are expected to enjoy better margins.

... a recent ... report highlights that nearly 60GW of capacity remains stalled due to interconnection delays and permitting hurdles. This massive "under-construction" pipeline, ... suggests that the 50GW figure isn't just a one-time spike, but likely the beginning of a sustained deployment cycle as companies fight to clear the backlog.

This operational success, along with the projects in the pipeline, is expected to attract capital back to the clean energy industry that was previously beaten down by policy fears and thereby regain investor confidence in its long-term profitability.

Green ETFs to Watch

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Invesco WilderHill Clean Energy ETF PBW

This fund, with a market value worth \$492.4 million, offers exposure to 63 stocks of companies that are publicly traded in the United States and engaged in the business of advancing cleaner energy and conservation. Its top three holdings are **Ampricus Technologies** (3.00%), a California-based high-power lithium-ion batteries manufacturer; **Darline Ingredients** (2.65%), a Texas-based leader in converting waste fats, oils, and greases into sustainable, low-carbon renewable diesel and aviation fuel; and BE (2.47%). Geographically, the United States holds the top position in this fund, with 74.5% weightage.

PBW has rallied 88.8% over the past year. The fund charges 64 bps as fees. It traded at a volume of 0.67 million in the last trading session...

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