Wind Powers American Business

2020
The Wind Powers American Businesses report highlights purchasing activity by corporate customers for energy from U.S. wind projects. This report focuses on corporate customers and does not include other non-utility customers such as universities, government, or the military.

Wind projects can be contracted to a corporate buyer through a number of mechanisms. The deals reflected in this report include long-term power purchase agreements (PPA), green tariff programs, green power purchase agreements, and direct ownership. Renewable energy certificate (REC)-only contracts are not included.

This report includes corporate wind energy contracts signed or announced through the end of 2019 for projects that are online, under construction, or in advanced development.

Data sources vary and include project owners and developers, press releases and other publicly available data, and subscription data services. While we’ve made every effort to capture corporate wind procurement activity, not every corporate wind energy purchase may be captured, particularly if a deal was not made public.

Data in this report can be cited to Wind Powers American Businesses 2020.
Introduction

Commercial and industrial (C&I) companies across the country are investing in wind energy to power their businesses and have established themselves as a significant demand driver for wind power.

Corporate purchasers invest in wind energy not only to lower emissions and meet sustainability goals, but also to secure fixed, low-cost energy protected from fuel price fluctuations. The cost of wind energy has dropped 70% since 2009, providing corporate purchasers with an affordable, reliable option to power their businesses.

The number and volume of corporate wind purchases has grown substantially in the past six years, from less than 800 MW at the end of 2013 to over 16,800 MW at the end of 2019. This is, in part, due to the economics of wind power, which is now the lowest-cost source of electricity generation in many parts of the country. It also reflects the emergence of sustainability and renewable energy goals among many companies, which have been driven by a desire to satisfy customer demand, growing pressure from investors, and branding concerns. In addition, it reflects company efforts to pro-actively plan for the regulation and pricing of emissions and mitigate the potential effects of climate change on business activities.

Companies bought a record amount of wind in 2019, entering agreements to procure at least 4,447 MW of wind capacity. Over the past five years, businesses have contracted an average of roughly 2,660 MW of wind power per year.

In total, corporate customers have contracted at least 16,857 MW of wind energy through the end of 2019. These deals include 10,281 MW of operating wind capacity and 6,577 MW of wind projects in various stages of development. For context, this is enough wind capacity to power the equivalent of 5.2 million average American homes.

While corporate wind purchases have grown significantly in recent years, it is still a relatively new market that only a fraction of US companies have entered and represents a large opportunity for future growth. Market consultants expect corporate demand for wind will continue to be strong in the coming years. In fact, a recent study by Wood Mackenzie estimates that Fortune 1000 companies will drive 85 GW of renewable energy demand through 2030.1

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Over 140 companies purchased at least 16,857 MW of U.S. wind energy through the end of 2019.

Google is the top wind energy customer in the U.S. with 2,397 MW contracted from wind projects across six states.

Facebook is the second largest purchaser with 1,459 MW of wind energy contracts, followed by Walmart with 1,333 MW. AT&T and Microsoft round out the top 5.

The top 10 corporate purchasers have contracted for over 9,400 MW of wind power, enough to power the equivalent of over 3 million average homes.

While technology companies have historically been the most active corporate purchasers of wind energy, the types of companies buying wind has diversified. Technology companies currently account for 41% of all contracted wind capacity, while retail companies represent 12% and telecommunications and food & beverage each represent 9%.

Corporate customers have signed contracts for more projects in Texas than any other state, accounting for 39% of all contracted capacity. Wind rich states like Oklahoma, Kansas, and Illinois have also been popular project locations for corporate buyers.

PPAs have been the primary purchasing mechanism for companies buying wind energy, accounting for 85% of total wind capacity contracts. Other methods have emerged such as green tariffs, which now account for 9% of all wind deals.
America’s Top Corporate Wind Purchasers
Google is by far the largest wind energy customer in the country with a total of 2,397 MW contracted through the end of 2019. The technology giant has strived to match 100% of its global energy usage with renewable energy.

Facebook ranks second in the U.S. with 1,459 MW of wind energy, as it seeks to power its social media data centers with zero-carbon energy.

Walmart is the third largest wind purchaser with a total of 1,333 MW contracted to date.

AT&T recently rose to fourth place with over 1,000 MW contracted after signing its first contract in 2018.

The top 25 companies include early adopters of wind energy such as Walmart, Google, Facebook, and Microsoft, as well as newer buyers like AT&T, Exxon Mobil, General Mills, and McDonald’s.

The top 25 companies account for 76% of all corporate wind energy purchases through 2019.

Walmart and Google were the first companies to sign large-scale wind purchases, in 2008 and 2010 respectively.

Eleven companies in the top 25 signed their first wind contract in 2017 or later, highlighting the recent increase in corporate purchasing activity.

A total of 39 companies have contracted at least 100 MW of wind energy.
Corporate purchasers are now buying 10% of all operating wind capacity as of the end of 2019, totaling 10,281 MW. Google also holds the top spot for purchases from wind projects that are currently operating, buying a combined 1,999 MW from wind projects that came online between 2010 and 2019. Facebook is second with 714 MW of wind power from projects that started operations since 2014. Amazon Web Services ranks third, purchasing 686 MW from projects that came online between 2015 to 2017. New buyer AT&T is in 4th place thanks to projects that started operations in 2018 and 2019. In total, 126 companies are buying wind from operating projects in the U.S., with 15 companies purchasing at least 200 MW. 72% of project capacity with a corporate buyer started operations in 2016 or later.
Corporate wind procurement set a record in 2019, with a total of 4,447 MW* contracted through PPAs and green tariffs.

29 companies announced wind energy deals in 2019, including 18 new buyers.

Walmart signed up the most wind energy in 2019, signing contracts for three wind projects totaling 541 MW. AT&T was second for the year with 460 MW from two projects, followed closely by Facebook with 440 MW. AT&T, Walmart, and Facebook were also the top three purchasers in 2018.

Google and Kimberly-Clark rounded out the top 5 purchasers for 2019.

The top new buyers of wind in 2019 were McDonald’s, Sprint Corp, Ford Motor Company, Crown Holdings, and Gap Inc. McDonald’s represents the first fast food company to purchase wind energy.

Ball Corporation and Honda both signed their first large-scale wind PPAs in 2019, adding to earlier onsite wind turbines at some of their manufacturing facilities.

In total, 13 companies agreed to purchase over 100 MW of wind in 2019.

*Does not include three contracts where the purchasers did not disclose the amount of wind capacity contracted.
A Day Powered by Wind

A New, Wind-Powered Day Begins: Wind starts powering your day as soon as the alarm clock rings and you check your smartphone for email or news and browse through Facebook or Instagram using AT&T’s, T-Mobile’s or Sprint’s wireless networks.

Fuel Your Day With Wind: More and more food and beverage companies like General Mills, Hormel Foods, and Smucker’s use wind to power their business, so there is a good chance your breakfast of champions is wind powered. Mom was right, eat your Wheaties!

Wind-Powered Commute: Even if you are not driving an electric car just yet, your new car could be powered by wind as automakers like GM, Ford, Honda, and Toyota are increasingly using wind power to help build their vehicles. That means you have wind at your back and at the wheel whether cruising down the open road or on your daily commute.

Renewable Pick-me-up: That cup of joe may be sourced from South America, but the store you stopped into for a fresh brew might be powered by wind. Starbucks and McDonald’s restaurants are using wind power to renewably deliver your favorite morning cup or quick bite to eat.

Happy Hour, Clean-Brewed: Raise a glass in celebration when it’s quitting time knowing your ice-cold Budweiser is made possible by wind. Now that’s something to toast to.

The Cloud, Powered by Wind: As you settle into your work routine and start accessing documents, you can have confidence that many cloud computing platforms are wind powered thanks to data center leaders like Amazon Web Services, Google, Iron Mountain, and Microsoft. These companies use wind energy to keep your data safe and accessible.

Life’s Needs: You know you never walk out of the store with just the one thing you went in for, but you can feel good about the retailers you shop at and brands you purchase no matter what you walk out with. Retailers like Target and Walmart are using wind to power their stores, and many of your favorite products found inside, from laundry detergent to toilet paper, are also produced using wind energy.
Industry Breakout
Wind energy is in demand across a growing variety of companies and sectors in the U.S.

Prior to 2015, technology and retail companies accounted for nearly 80% of corporate wind energy purchases. Today, they account for 53%, reflecting the emergence of other industries.

Technology companies dominated the corporate wind market for years as many large companies introduced sustainability goals and worked to power their energy-intensive data centers with clean energy.

While tech companies continue to procure wind, other industries have discovered the value of powering their business with wind and have started buying large amounts of wind energy.

The industrial sector was active in 2015 and 2016, representing the second largest group of wind energy purchasers prior to 2018. However, purchases by industrial buyers have slowed down since 2016 while other sectors have picked up.

In particular, purchases by companies in the retail, food and beverage, and telecommunications sectors increased significantly in the past few years. Consumer goods and automotive sector purchases have also grown, although at a slower rate.

Notably, telecommunications companies first signed up for wind energy in 2017 and are now the third largest sector, representing 14% of deals signed since 2017.

At the end of 2019, the technology sector accounted for 41% of total corporate wind energy purchases. Retail claimed the second spot with 12% of total contracted capacity, while telecommunications and food and beverage rose to third and fourth, each with 9% of the market.
Google leads 20 companies in the technology sector buying wind. Tech companies have large electricity loads and, on average, purchase more than other sectors.

Seven retail companies have purchased wind energy, with Walmart standing out as a long-time leader.

The telecommunications sector is currently dominated by AT&T, with only two other companies signing wind energy contracts.

General Mills is the leading wind energy buyer among 19 food & beverage companies. These companies generally have smaller load than those in other sectors like technology or telecommunications.
Google was an early adopter of renewable energy and is one of the world’s largest corporate buyers of renewables. The technology giant was the second company in the U.S. to sign a long-term, large-scale contract for wind energy, purchasing power from a 114 MW wind farm in Iowa in 2010. Today, Google has procured more than 5,000 MW of wind and solar capacity globally, including nearly 2,400 MW of U.S. wind energy.

Google’s wind energy purchases are driven by a commitment the company set in 2012 to match 100% of their operations with renewable energy. The company first met the goal in 2017, and successfully maintained it in 2018 and 2019, by purchasing enough renewable energy to match all of their global annual electricity consumption. Going forward, Google aims to source carbon-free energy for all of its operations at all times, matching hourly demand with hourly carbon-free generation.

Google’s data centers represent a significant portion of the company’s electricity needs. When buying renewable energy, Google has focused on purchasing from renewable resources on the same grids as their data centers and other operations. For example, Google has purchased over 700 MW across 5 wind projects in Oklahoma, which is home to Google’s Mayes County data center. In fact, Google stated the availability of renewable energy is one of the top reasons that the company chose Mayes County, Oklahoma as the location for its data center. As Google expanded the data center, the company signed additional power purchase agreements for new wind projects in the state. While the wind projects do not directly power the data center, the renewable energy helps offset the data center’s electricity use.

Beyond meeting its sustainability goals, Google seeks to play a positive role in the communities it operates. As of June 2019, Google’s Mayes County data center campus employed over 500 workers in the community. Google has provided funding to local organizations such as the Boys and Girls Clubs of Green County, the Tulsa Regional STEM Alliance, and schools across Oklahoma. Pryor Public School District has also benefited from Google’s partnership with the community – since Google began construction on its data center in 2011, the County’s total assessed property value has doubled, providing schools with more tax revenue.

*Company Spotlight — Google*

Google’s Mayes County Data Center. Photo provided by Google.

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Corporate Wind Deals Across the Country
A total of 198 wind projects across 29 states have a corporate purchaser.
Companies tend to procure wind power from states with a high-quality wind resource combined with the presence of a wholesale electricity market, retail choice, or green tariff program.

Over half (61%) of all corporate deals executed so far are tied to projects in Texas, Oklahoma, and Kansas. These states all possess exceptionally strong wind resources, have a lot of wind project development activity, and are part of competitive wholesale electricity markets.

Texas alone is home to 39% of wind capacity sold to a corporate buyer. The state benefits from a strong wind resources, extensive transmission, and deregulated wholesale and retail electricity markets.

Texas is a deregulated state with retail choice, meaning customers can buy electricity from alternative suppliers other than their local utility. States with retail choice are conducive to corporate wind procurement, as pricing is more correlated to the wholesale market and provides a cleaner hedge against price volatility.

Nebraska and South Dakota both saw a large increase in corporate wind deals in the past two years as wind project development has grown in these strong wind resource states.

Texas is Home to the Most Corporate Wind Deals

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Top States for Corporate Wind Purchases

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<th>State</th>
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Includes both operational and planned capacity. Procurement includes power purchase agreements, direct-ownership, REC-only contracts, Green Tariffs, and other procurement mechanisms.
Most companies with wind energy deals in the U.S. today are buying wind from one project in one state, while the largest purchasers are procuring wind from multiple states. Currently only 26 companies out of 147 are buying wind energy from more than one state, and 34 companies are buying from two or more projects. Only 10 companies have contracted for wind energy from 3 or more states.

Google has the most geographically diverse mix of wind energy of any corporate buyer. The tech giant is buying wind from 15 projects across 7 states.

Walmart has the second most diverse mix, purchasing energy from 12 wind projects across 6 states to power its retail stores.

Facebook is third with contracts for 8 wind projects in 6 states. Microsoft and Amazon round out the top 5, both procuring wind from projects in 5 states.

Large buyers like Google, Walmart, Facebook, Microsoft, and Amazon have many large data centers or stores across the country and have made efforts to buy wind from projects in the same state or region as the data centers and stores they are powering.
Company Spotlight — Walmart

Walmart was an early adopter of wind energy, signing the first ever large-scale corporate wind power purchase agreement in the U.S. in 2008. Walmart has continued to invest in wind energy since then, announcing 12 wind energy deals totaling 1,333 MW through 2019. The retail giant signed contracts for 541 MW in 2019 alone, leading all other companies for the year.

When Walmart announced three new wind power purchase agreements in 2018, Mark Vanderhelm, vice president of energy for Walmart, said the following: “Walmart has a goal to be supplied by 100 percent renewable energy and sourcing energy from wind farms [...] is a core component in the mix. Wind energy is an important part of our energy portfolio, and Walmart plans to continue our efforts to pursue renewable energy projects that are right for our customers, our business, and the environment.”

Walmart has a company goal to power 50% of its operations with renewable energy by 2025, which is part of a larger, science-based target to reduce emissions in their operations 18% by 2025 compared to 2015 levels. Walmart’s 2019 Environmental, Social & Governance Report shows renewable sources supplied roughly 28% of the company’s global electricity needs in 2018. This includes generation from over 520 renewable energy projects across 8 countries. Walmart expects to source 35% of their electricity from renewables by 2020 based on their pipeline of renewable energy projects.

Additionally, Walmart introduced an initiative called Project Gigaton in 2017, through which Walmart is working with their suppliers to avoid a total of 1 billion metric tons (a gigaton) of greenhouse gas emissions from the global value chain by 2030. More than 1,000 suppliers have signed on to this initiative so far, and suppliers reported avoiding over 25 million metric tons of emissions at the end of Fiscal Year 2019.

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Photo courtesy of Walmart.
C&I Wind Purchasing Trends
The volume of corporate wind energy deals has grown significantly as wind costs have dropped 70% over the last decade.

Activity began to pick up in 2014 when corporate purchasers contracted over 1,000 MW of wind energy for the first time.

Corporate buyers have now contracted over 1,000 MW in each of the past 6 years, with over 4,000 MW of deals in both 2018 and 2019.

Over the past five years, businesses have contracted an average of roughly 2,660 MW of wind power per year.

Total corporate wind procurement has grown 275% since 2015.
Purchasing mechanisms for corporate buyers have evolved over time, with new options emerging that made it easier for companies to purchase wind.

From 2002 to 2012, the majority of corporate wind energy procurement occurred through direct ownership of small, one to three-turbine wind projects located on-site of the facility using the power.

The first large-scale, long-term wind PPA in the U.S. was signed in 2008 by Walmart, followed by Google in 2010 and 2011.

Green power purchase agreements, deals where companies purchase RECs from a specific wind project through their utility, popped up between 2012 to 2014 as companies sought new ways to buy large amounts of wind energy.

PPAs became the primary purchasing method after 2014 and account for 85% of all corporate wind purchases to date. Virtual power purchase agreements in particular have been very popular in recent years.

Green tariff deals started to emerge in 2017 and saw an uptick in 2019. A green tariff is a program that allows companies to buy wind energy from a specific wind project through their local utility, rather than signing a contract directly with the project owner or developer. Green tariffs accounted for 22% of corporate wind deals in 2019.
As the volume of corporate contracts has increased, so has the number of operating projects and associated capacity tied to corporate customers.

Prior to 2015, corporate offtake represented a small portion of new wind capacity installations.

Since 2015, corporate customers have had contracts in place for more than 20 percent of new wind additions each year.

Over the past five years, companies have been the offtake customer for an annual average of 1,870 MW of newly installed wind projects.

Corporate purchasers have deals in place for 23% of the wind capacity installed in 2019.

Cumulatively, corporate customers are buying 10,281 MW of operating wind capacity, representing 10% of total U.S. wind capacity as of the end of 2019.
Since corporate procurement first picked up in 2013 and 2014, companies have been signing sizeable wind energy contracts.

In every year since 2013 the average amount of wind energy purchased per company exceeded 90 MW. In 2019, companies purchased an average of 143 MW each.

The number of companies buying wind per year grew significantly in the last two years, with over 30 purchasers in both 2018 and 2019.

2018 saw highest number of companies on record, with 39 companies signing wind energy contracts.
AT&T signed its first wind energy contracts in 2018 and quickly rose to be one of the top corporate purchasers in the country. The telecommunications company was the top corporate buyer in 2018 after signing contracts for 600 MW of wind energy (note they signed an additional PPA for 220 MW, but the project was later canceled). In 2019, AT&T purchased an additional 460 MW from two wind projects, propelling the company to the number four spot for corporate buyers in the nation. AT&T’s wind energy purchases are part of the company’s goal to enable carbon savings equivalent to ten times the footprint of its operations by 2025.

One of AT&T’s first PPAs was with NextEra Energy Resources for 300 MW of wind power from the AT&T Windstrong Energy Center, also known as the Torrecillas wind project, in Webb and Duval Counties in Texas. AT&T went beyond simply purchasing wind power and chose to invest in students seeking careers as wind turbine technicians. The company donated $50,000 to Texas State Technical College to establish the AT&T Wind Energy Scholarship fund and $25,000 in scholarship money to Canadian Valley Technology Center’s wind energy technician training program. Wind turbine technician is the second fastest growing career in America, according to the Bureau of Labor Statistics.10

Nicole Anderson, the President of the AT&T Foundation, recently said she sees wind technician training programs as a way for the company to invest in renewable energy, give back to the community, and build a strong workforce. “While we’re investing in renewables we also want to invest in the people who are bringing clean power to the grid, and when you take a look at what we see out in the labor markets, wind turbine technician is one of the fastest growing occupations in America. Building that pipeline of talent is exactly what we’ve been doing through our Aspire initiative. We’ve been taking a look at how to get to under-served under-represented communities and make sure they are a part of a robust and diverse talent pipeline not only for AT&T but for the country at large.”11

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Impacts of C&I Wind Purchases
Reducing carbon emissions to meet sustainability goals has been a key motivator for many businesses to buy wind energy.

Wind power has some of the lowest environmental impacts of any source of electricity generation. Wind energy does not burn fuel to generate electricity and, as a result, does not emit any air pollutants such as carbon dioxide, sulfur dioxide, nitrogen oxides, or particulate matter. Wind power also significantly reduces or avoids consumption of water, which is used to cool thermal power plants.

Wind energy is one of the best and most affordable options for reducing carbon emissions from the electric sector due to its high capacity factors, low costs, and location in fossil-fuel heavy electric grids.

The 10,281 MW of operating wind capacity with corporate buyers avoids roughly 20 million metric tons of carbon dioxide emissions annually, equivalent to 4.2 million cars’ worth of emissions.

This operating capacity also avoids an estimated 24,000 metric tons of sulfur dioxide and 16,000 metric tons of nitrogen oxides per year, pollutants that trigger asthma attacks and create smog.
Wind projects contribute significantly to local, rural communities in the form of capital investment, job creation, tax payments, and lease payments to landowners.

C&I wind power purchasing has enabled over 10 GW of wind projects to come online. These projects represent $17 billion in capital investment and in many areas are among the largest investments in new infrastructure.

Each year wind projects supplying corporate buyers deliver over $164 million in localized payments, including $95 million in state and local tax payments and $69 million in land-lease payments.

Corporations increasingly consider the availability of renewable energy to power their business in investment decisions. Access to wind power can bring millions of dollars of additional investments to communities. Consider Papillion, Nebraska which saw Facebook invest over $400 million to triple the size of a data center. Access to wind power played a central role in site selection.
Corporate Wind Energy
Demand Expected to Grow
Corporate purchasing of renewable energy is expected to grow substantially in the 2020s. The barriers to entry are falling as financial instruments supporting the sector come to market, while falling renewable costs provide an excellent long-term power price hedge. Peer pressure continues to build as consumers and investors increasingly demand sustainable products delivered using clean energy. Finally, companies are increasingly looking to mitigate climate-related risks and prepare now for the future possibility of emissions regulation and pricing.

While early action is notable, corporate renewable procurement has only scratched the surface of potential demand.

There are nearly 30 million businesses operating in the U.S., consuming approximately 2,500 terra-watt hours (TWh) of electricity per year. Fortune 1000 companies make up 48% of this electricity demand, requiring roughly 1,192 TWh of electricity annually.

Currently, only 1% of F1000 electricity demand is met via direct procurement of operating wind or solar power, with another 1% contracted but not yet built.

After accounting for renewable contracts signed so far along with REC-only purchases, nearly 95% of Fortune 1000 demand is up for grabs. Assuming a net capacity factor of 42%, this equates to over 300 GW of new wind power capacity. While all that demand is not expected to be met by wind or renewables, it provides a useful scale of opportunity.
Wood Mackenzie estimates Fortune 1000 companies will procure 85 GW of additional renewable power through 2030 based on existing company targets, estimated future targets, and continuing transition from REC purchases to direct sourcing. Wind, solar, storage, and hybrid projects are expected to remain the technologies of choice to meet this demand, with localized cost trade-offs primarily driving the decision.

Regionally, Wood Mackenzie anticipates the majority of C&I procurement to be sourced from renewable projects located in ERCOT, MISO, and PJM. In part this reflects the geographic concentration of corporate locations within these markets as well as renewable resource availability. The Southeast is also expected to host significant C&I procurement, albeit mostly solar. Opportunities in the west are more limited due to rapid decarbonization efforts already underway in the region alongside strong renewable policies.

More details are available in the full Wood Mackenzie report, Analysis of Commercial and Industrial Wind Energy Demand in the United States.
About AWEA

AWEA is the national trade association for the U.S. wind industry, the largest source of renewable energy in the country. We represent 1,000 member companies, 120,000 jobs in the U.S. economy, and a nationwide workforce located across all 50 states. AWEA serves as a powerful voice for how wind works for America. Members include global leaders in wind power and energy development, turbine manufacturing, and component and service suppliers. They gather each year at the Western Hemisphere’s largest wind energy event, the AWEA WINDPOWER Conference & Exhibition, next in Indianapolis, June 7-10, 2021. WINDPOWER 2021 will be housed within CLEANPOWER, the new exhibition hub for utility-scale renewable energy, bringing together wind power, solar power, and energy storage industries. Visit AWEA’s website to learn more about the enormous economic benefits wind power brings to America and be sure to follow us on Facebook, Twitter, and LinkedIn.