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GLOBAL SUSTAINABILITY

The energy transition in the United States: The past 15 years and current situation

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From 2011-2026, the United States has had a shifting energy and climate policy environment at the federal level, evolving subnational policies, and increasing market-driven action

U.S. national government through President & Congress

- Federal regulatory strategies in Obama and Biden terms, with some reversals in Trump 1, including:
 - Standards on GHGs and other air pollutant emissions from fossil fuel power plants
 - Corporate Average Fuel Economy standards for vehicles
- Substantial federal tax credits for solar and wind through Obama, Trump 1, and Biden terms
- Biden era fiscal incentives and green industrial policy through BIL & IRA
 - Invested over \$1 trillion into clean energy, energy efficiency, methane mitigation, manufacturing
- Trump 2 term: Major changes through exec orders, regulatory changes, Congress

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U.S. Subnational Governments

In the U.S. constitutional system, substantial policy authorities are delegated to states, cities, counties and other governments. For example:

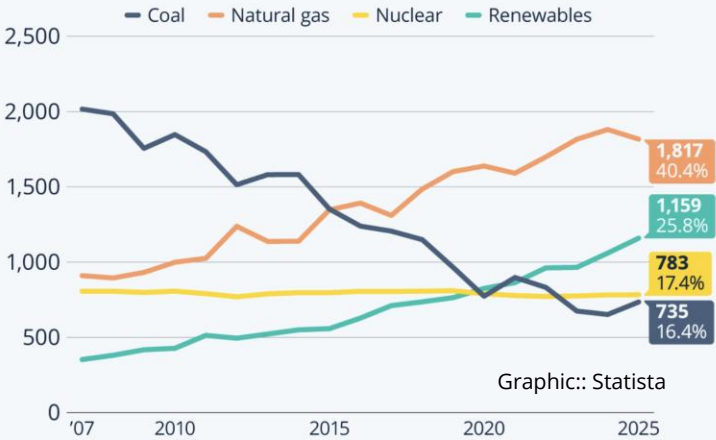
- States have substantial policy authority over electricity generation and building codes
- Cities have substantial policy authority on waste, zoning, transportation, and wastewater.

Coalitions such as America Is All In and the U.S. Climate Alliance of States collectively represent over half of emissions, 65% of population, and roughly 70% of U.S. GDP—equivalent to the world’s second-largest economy.

Example State Actions: GHG emissions targets, renewable energy standards, zero-emission vehicle programs, landfill methane regulations, building performance standards, Regional Greenhouse Gas Initiative (RGGI), etc.

Example City Actions: Climate action plans, energy benchmarking and building performance standards, mode shift targets, electric vehicle adoption targets, etc.

CGS analysis shows that without federal action, these actors can deliver substantial reductions in U.S. emissions.



Sources: U.S. Energy Information Administration, Sustainable Energy in America Factbook

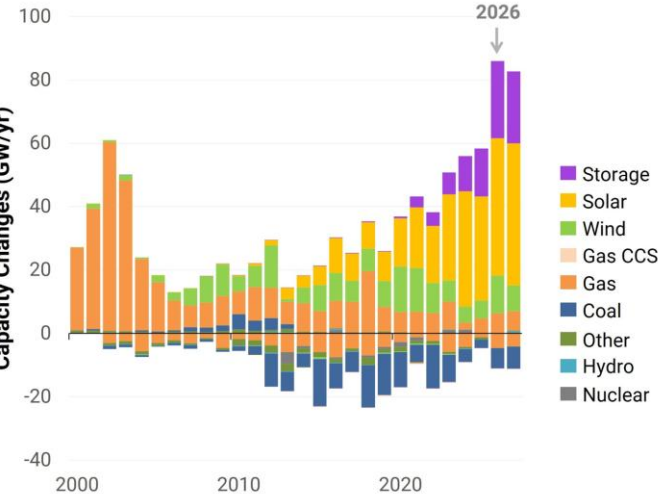
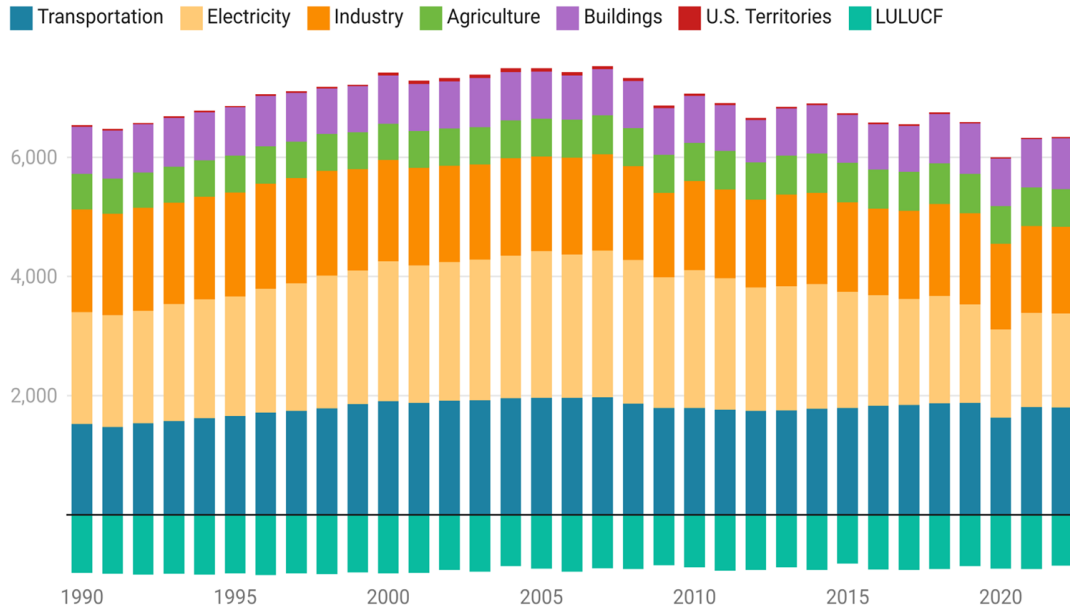


Chart by John Bistline (@JEBistline) with data from EIA-860 (updated February 2026)

Energy transition in the United States

- **Renewables now account for more than 25% of U.S. electricity generation with coal at 16%**
 - Over the past decade, coal generation declined by 45%, while renewable generation more than doubled and gas generation increased by 27%
 - Capacity build out for RE is high. Last year, >90% of new generation capacity was RE
- Solar, wind, and battery storage capacity increased threefold over the last decade, reaching over 300 GW.
 - Annual capacity additions from solar, wind, and battery storage reached 48 GW/year in 2025, making up 90% of total capacity additions
- Oil and gas production has increased. Now the top exporter of LNG, the U.S. started exporting in 2016, reaching 12 billion cubic feet per day in 2024 (about 10% of production).
- EVs currently about 2% of LDV fleet and 10% of new sales

U.S. greenhouse gas emissions trends



- **U.S. net greenhouse gas emissions have been decreasing**, reaching an 18% reduction below 2005 levels in 2023.
- **The electricity sector has driven most of these reductions**, with emissions falling by 36% over this period due to a mix of market and policy forces that have improved energy efficiency and reduced coal use
- Large contributions to future reductions could be driven in electricity, transport, O&G methane

Current situation in the United States

- **Since January 2025, the federal government has initiated significant policy changes** that reduce emphasis on renewable technologies, EVs, and efficiency, and support fossil and nuclear.
 - Delivered through executive orders, regulatory changes, budget reallocations, and other Congressional actions
 - Major examples include provisions from the IRA and BIL, regulations on fossil fuel power plants and tailpipe emissions standards, and the endangerment finding.
 - Attempts have also been made to restrict subnational authorities over energy & climate policy
 - Many of these changes face legal challenges and their long-term impacts remain unclear.
- **Current political discussion focuses on economy, benefits, and jobs**
 - **Deployment of renewable energy faces opposing pressures** due to the combination of decreased federal policy and incentive support and increases in costs due to tariffs; but with substantial decreases in RE cost, and supply limitations associated with natural gas turbines.
 - **Growing concern around electricity demand growth from data centers**
 - **EV adoption is not increasing**, tariffs on EVs remain high, domestic manufacturers retooling
 - **Energy affordability** has risen to the forefront of U.S. economic and policy debates.

Overview of current landscape in the United States

- **Subnational actors and businesses are taking diverse approaches**
- Substantial variation in energy policy and climate ambition at the subnational level, and efforts are needed to support climate action in lower-ambition states.
- Some states are driving forward on RE deployment for reasons other than climate and this will be worth following

The Washington Post
Democracy Dies in Darkness

Why MAGA suddenly loves solar power

The Trump-led attack on solar eases as the right reckons with its crucial role in powering AI and keeping utility bills in check.

March 2, 2026

Press Release | December 2024

U.S. Climate Alliance Applauds New Federal Goal to Slash Harmful Climate Pollution, Sets Complementary Collective 2035 Target

December 19, 2024

11 states launch coalition to expand clean cars in face of federal attacks


 Jameson Dow | May 23 2025 - 8:00 am PT | [56 Comments](#)

Colorado adopts U.S.-leading standard to cut GHG emissions from midstream oil and gas

12/27/2024

POLITICS

New carbon emissions program emerges as way to help fund Oregon transportation

 **Dianne Lugo**
Salem Statesman Journal

May 22, 2025, 5:35 p.m. PT

Here Is Everything That Has Changed Since Congestion Pricing Started in New York

Fewer cars. Faster travel. Less honking. And some questions we still can't answer.

Main prospects and future outlook

- Broadening the conversation to link climate policy with energy affordability, jobs, and other economic and social benefits.
- Better understanding the energy impacts of data centers and the role of renewable energy
- Enhancing climate actions at the subnational level, especially in lower ambition states. This can happen via local action, regional spillover, market forces, etc.
- Possible shifts in federal landscape in November 2026 and in November 2028