

# Capital electricity market trends



## Overview

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Utilities must balance growing energy demands, decarbonization goals and customer satisfaction while navigating regulatory and financial challenges. Creative financing and strategic partnerships are crucial to funding ambitious energy projects amid high capital costs. After decades of modest growth, US electricity demand began accelerating in 2025, surpassing. US investor-owned energy and water utilities will commit significant capital over the next several years to new infrastructure investments aimed at reliability and resiliency upgrades, new gas, nuclear, renewable and other generation to meet demand growth. The report provides a global benchmark for tracking capital flows in the energy sector. The Minnesota Climate Innovation Finance Authority's (MnCIFA) survey of solar developers in the state suggests a “K-shaped” trajectory for the solar industry: The large solar developers remain the big fish in a shrinking pond while smaller ones working on smaller projects lose out. A lawsuit by the. y landscape is undergoing a transformative shift.

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### U.S. Power Demand Multiple Factors Driving Growth

U.S. utility capital expenditures (CAPEX) are on an unprecedented rise, driven by surging electricity demand, the need to modernize aging infrastructure, and the transition to renewable energy sources.

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### Strengthening America's Energy Infrastructure to Increase Reliability

As the economy electrifies and more electrons flow through the grid, capital expenditures will be distributed across a larger base, driving down costs for everyone. These investments will ensure

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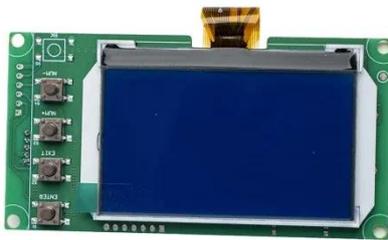
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### World Energy Investment 2025 - Analysis

This year's World Energy Investment report, marks the 10th edition of this flagship analysis and provides a full update on the investment picture in 2024 and an initial reading of the emerging ...

## 2025 Utilities sector outlook , EY

Utilities face rising demand and high costs, but opportunity lies in modernizing infrastructure and using renewable energy and technology. Utilities must balance growing energy ...



## U.S. Corporate Capex Cycle Aided by AI, Energy Demand, Policy ...

Fitch Ratings-Toronto-29 July 2025: U.S. corporate capital spending will remain elevated through 2026 due to artificial intelligence (AI) and rising energy demand and may accelerate further with recent ...

## US utility capex forecast nudges higher on increased generation

Note: This report is designed to identify capital expenditure trends in the US utility sector, drawing data from a range of sources, including corporate investor presentations, annual reports and other sources.



## 2026 Power and Utilities Industry Outlook

After decades of modest growth, US electricity demand began accelerating in



2025, surpassing expectations in many utility plans. The surge was driven by artificial intelligence training workloads,

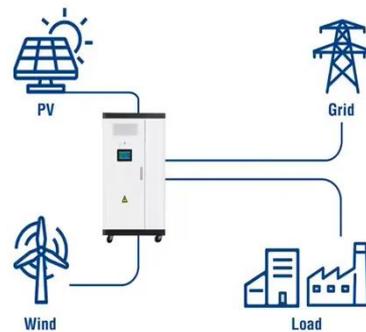
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## Research note: Energy finance in 2026

Read the full research note here. Energy finance in 2026: Trends in capital markets Every January, the project finance law team at Norton Rose Fulbright (NRF) brings together bankers and ...

## Utility-Scale ESS solutions



## Capital Markets Can Solve Surging Power Prices

Under CDE, utilities would earn only their actual market-based cost of capital, removing the reward for excess spending. With capital bias eliminated, regulators could implement meaningful

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## Annual Energy Outlook 2025

Introduction The Annual Energy Outlook 2025 (AEO2025) explores potential long-term energy trends in the United States.

AEO2025 is published in accordance with  
Section 205c of the ...



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