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Sunrun Builds the Nation's Largest Distributed Power Plant After Quintupling Customer Participation in 2025

Sunrun scales the nation's largest distributed power plant with 400% growth, 17 programs, major partnerships, and record grid dispatches as AI-driven electricity demand surges

SAN FRANCISCO, Feb. 03, 2026 (GLOBE NEWSWIRE) -- With rising electricity costs, growing risk of power outages, and a widening gap between power supply and demand, Sunrun (Nasdaq: RUN), America's largest provider of home battery storage, solar, and home-to-grid power plants, rapidly delivered new, dispatchable energy to the grid at scale and at speed.

In 2025, customer participation in Sunrun's distributed power plant programs grew more than fivefold, transforming the business into one of the largest sources of flexible, dispatchable energy in the country. Sunrun dispatched nearly 18 gigawatt-hours of energy from batteries to support grids across America—enough electricity to power 15 million homes for one hour—with a combined peak output of 416 megawatts, a capacity greater than many fossil-fuel peaker plants.

"Sunrun's distributed power plants hit scale at exactly the same time grid operators needed help meeting energy demand," said Sunrun CEO Mary Powell. "It was a record-breaking year, both in terms of U.S. power demand and Sunrun's ability to deliver large amounts of energy to grids across the country quickly, reliably, and at lower cost."

More than 106,000 Sunrun customers were enrolled in Sunrun's 17 distributed power plant programs in 2025, a dramatic increase from approximately 20,000 the year prior. At least one program dispatched every day throughout the year, totalling more than 1,300 dispatches across all programs. These dispatches supported grids during critical hours and helped avoid power outages while putting downward pressure on energy costs for all ratepayers.

Grid operators across the country are sounding the alarm as electricity demand—driven by AI, data centers, electrification, and extreme weather—outpaces new generation. ICF projects U.S. electricity demand will rise 25% by 2030, compared to 2023 levels. Last summer, PJM Interconnection, the largest power grid operator in the U.S., narrowly avoided rotating outages during a heatwave and is now facing record-high capacity prices amid supply shortages.

"The warning signs for our nation's power grid are flashing," said Sunrun President and Chief Revenue Officer Paul Dickson. "Demand for electricity is outpacing supply and prices are skyrocketing. Sunrun is proving that a quick way to build dispatchable capacity and avoid

new transmission, fuel costs, or multi-year construction timelines is by leveraging home battery storage paired with solar."

Sunrun's distributed power plant innovations and highlights from 2025 include:

- **Texas:** Sunrun's distributed power plant with Vistra's TXU Energy dispatched more than 200 times to supply critical energy during extreme heat, providing cost control to all energy customers. New partnerships to build distributed power plants with NRG Energy and Tesla Electric were also announced and have begun initial activation.
- **California:** For the second consecutive year, Sunrun helped operate the nation's largest distributed power plant, leading a historic dispatch that provided enough electricity to power more than half of the city of San Francisco during peak demand. Sunrun also partnered with PG&E on a first-of-its-kind program to deliver targeted, neighborhood-level grid relief to help PG&E avoid or defer system upgrades.
- **Maryland:** Sunrun launched the nation's first residential vehicle-to-grid distributed power plant in partnership with Ford and Baltimore Gas and Electric Company, demonstrating that the large batteries inside electric vehicles can help stabilize the grid during times of peak demand.
- **Puerto Rico:** More than 30,000 Sunrun customers repeatedly kept power flowing when traditional power plants failed. The island's electric utility provider, LUMA, credited Sunrun's distributed power plant as a "major energy milestone."
- **Northeast:** Sunrun operates New York's largest distributed power plant, which, along with Sunrun's distributed power plants in Massachusetts and Rhode Island, responded to East Coast heat waves and relieved grid stress throughout the summer.

The 17 programs leverage Sunrun's 217,000 home battery storage systems—the largest fleet in America—to deliver efficient, affordable solutions. Sunrun expects to have 10 gigawatt-hours of dispatchable capacity online by the end of 2028.

Utilities and grid operators compensate Sunrun for managing and operating distributed power plants, and Sunrun shares those payments with participating customers. In 2025 alone, customers earned more than $17 million for participating in a distributed power plant.

About Sunrun
Sunrun Inc. (Nasdaq: RUN) is America's largest provider of home battery storage, solar, and home-to-grid power plants. As the pioneer of home energy systems offered through a no-upfront-cost subscription model, Sunrun empowers customers nationwide with greater energy control, security, and independence. Sunrun supports the grid by providing on-demand dispatchable power that helps prevent blackouts and lower energy costs. Learn more at www.sunrun.com.

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Forward-Looking Statements
This press release contains forward-looking statements within the meaning of Section 27A of the Securities Act of 1933 and Section 21E of the Securities Exchange Act of 1934. Forward-looking statements include, but are not limited to, statements regarding Sunrun's expectations for dispatchable capacity growth, the anticipated benefits of distributed power plant programs, and the Company's ability to support grid reliability. Words such as "expect," "anticipate," "target," "plan," and similar expressions identify forward-looking statements.

These statements are based on current expectations and assumptions and are subject to risks and uncertainties that could cause actual results to differ materially, including: the Company's ability to enroll customers in grid services programs; changes in utility rate structures, net metering policies, and regulatory frameworks; the availability of incentive programs; supply chain constraints; and macroeconomic conditions. Additional risks are described in Sunrun's filings with the Securities and Exchange Commission, including its most recent Quarterly Reports on Form 10-Q, which was filed with the U.S. Securities and Exchange Commission (“SEC”), as well as in other reports that Sunrun filed with the SEC.

Forward-looking statements are based on beliefs, assumptions, and expectations as of the date of this press release. Sunrun disclaims any obligation to publicly release the results of any revisions to these forward-looking statements reflecting new estimates, events, or circumstances after the date of this press release.



Source: Sunrun Inc.