

Pathways to 2035: Expanding non-federal climate leadership in the United States

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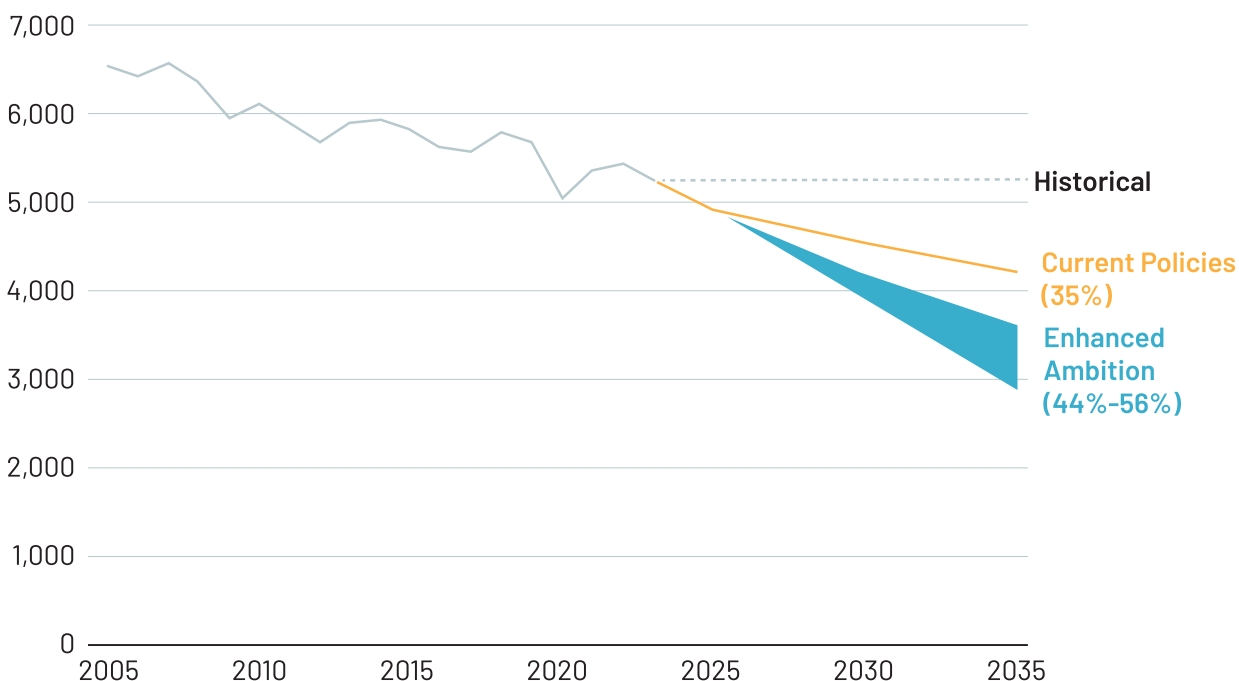
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Since January 2025, the U.S. federal government has taken a wide range of steps to roll back key clean and affordable energy policies that were expected to deliver major economic, health, and climate benefits. However, climate leadership from states, cities, private actors, and other non-federal actors, combined with market forces and technological advances, can help counteract the impacts of federal climate policy rollbacks. **By leveraging state, local, and regional leadership, the United States can still make meaningful progress towards its global commitments and climate goals, while enhancing prosperity, energy security, and public health.**

A new *America Is All In* analysis, led by the Center for Global Sustainability (CGS) at the University of Maryland, examines how the United States can still make significant progress toward its 2035 climate goals despite recent policy changes.

The analysis finds that expanded non-federal climate action in the United States, combined with **renewed federal engagement after 2028**, can still achieve up to a **56% reduction in greenhouse gas (GHG) emissions below 2005 levels by 2035**.

Net GHG emissions (MMTCO₂e)



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Download the full report to learn more at go.umd.edu/USPathwaysto2035

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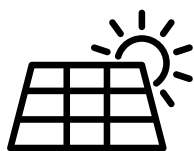


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In addition, the All In-CGS analysis found:

- Without federal re-engagement and additional actions from non-leading states, enhanced climate action from more ambitious regions could still reduce overall U.S. GHG emissions by 44% by 2035.
- Without any enhanced actions, current policies under federal and non-federal actors would result in a 35% reduction in economy-wide GHG emissions by 2035.
- Electricity demand growth has recently become much more uncertain due to rapid changes in the dynamics of data centers, efficiency, electric vehicles (EVs), heat pumps, and more. Total electricity demand could increase 34% by 2035, relative to 2021 levels.
- Data centers play a large role in the increase in electricity demand, making up 30% of demand growth, while the remaining growth comes from EVs, heat pumps, and other end-use electrification.

The analysis also lays out key strategies that subnational entities can employ to achieve these reductions, most importantly:



Renewable and
clean energy
targets



EV incentives
and low-carbon
fuel standards



Intensity
standards for oil
and gas methane



Zero-emission
construction
standards

The CGS study models major climate-related policies at the federal and state levels that can help achieve GHG emissions reductions in the United States. Three distinct scenarios are modeled to represent recent federal climate policy changes and expanded climate action from non-federal actors:

- **Current Policies:** The analysis's Current Policies scenario updates key federal policies after rollbacks under the current administration, including changes to the Inflation Reduction Act and Bipartisan Infrastructure Law under the recently passed One Big Beautiful Bill Act and the removal of the California waiver. States and other non-federal actors are assumed to continue to implement existing policies.
- **Enhanced Ambition (Low):** This scenario assumes that climate-leading states strengthen their climate actions, and non-leading states adopt less ambitious climate actions at a slower pace.
- **Enhanced Ambition (High):** This scenario assumes that in addition to the climate-leading states, non-leading states also adopt high-ambition policies driven by various approaches, including strong bottom-up climate leadership from local governments, bold business commitments and investments in clean energy technologies, and regional spillover impacts.