

## **U.S. Data Center Construction Market - Industry Outlook & Forecast 2025-2030**

Market Report | 2025-05-13 | 501 pages | Arizton Advisory & Intelligence

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### **Report description:**

The U.S. data center construction market size by investment is expected to grow at a CAGR of 15.15% from 2024 to 2030.

### **U.S. DATA CENTER CONSTRUCTION MARKET KEY TRENDS**

#### **Megawatt To Gigawatt Hyperscale Campus**

In March 2025, AI contributed over 50% growth in the U.S. data center market in 2024. The power capacity addition by collocation as well as hyperscale self-built was more than 4.5 GW in 2024. With the rise of AI technologies such as ChatGPT by OpenAI, AI has shifted from a supportive role to a key trend that is reshaping the data center industry. The uptake of AI in different sectors is still quite low, with the U.S. Census Bureau indicating that only 3.8% of businesses were utilizing AI for production as of 2024. We expect this percentage share to skyrocket in the next five years. Also, in October 2024, OpenAI increased its data center presence through collaborations with Oracle and the establishment of new facilities in Texas. In addition, to open OpenAI, hyperscale cloud service providers and GPU as a service providers are also expanding their presence significantly in the market. These factors are projected to have a positive impact on the U.S. data center construction market.

#### **Innovative Data Center Technologies**

The need for innovative techniques has become essential to meet the increasing demand for efficient, sustainable, and scalable infrastructure. As digital transformation accelerates across industries, data centers must evolve to keep pace with growing technological and environmental challenges. By utilizing energy-efficient infrastructure and integrating carbon-free solutions, data centers significantly reduce operational costs and promote environmental responsibility.

A few data center operators are considering nuclear power as a low-carbon energy source. Data center operators might publicly support nuclear as a carbon-neutral option, and some major companies are already mentioning their role in providing low-carbon electricity. Big companies like AWS, Google, and Microsoft also have mentioned nuclear power as a low-carbon electricity option. In October 2024, Google partnered with Kairos Power to utilize small nuclear reactors for powering its AI data centers, aiming to

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deploy its first reactor by 2030

Companies in the U.S. data center construction market focus on sustainable building materials to reduce carbon emissions. For instance, in October 2024, Microsoft utilized cross-laminated timber (CLT) in the construction of its Northern Virginia data centers, aiming to reduce the embodied carbon footprint by up to 35% compared to steel and 65% compared to concrete.

## SEGMENTATION INSIGHTS

- Traditionally, VRLA batteries have been adopted by operators in the U.S. data center construction market. However, data center operators are now moving towards lithium-ion batteries and nickel-zinc batteries.
- Traditionally, diesel fuel has been used by operators in the U.S. data center construction market. However, due to high carbon emissions and sustainability goals, data center operators are moving towards hydrotreated vegetable oil (HVO). Most data centers are expected to replace diesel generators with HVO in both existing and new facilities.
- The increasing rack density will necessitate the need for high-density rack PDUs and busway systems. Most of the rack PDUs deployed in data centers will support over 15 kW. Also, three-phase busway systems ranging from 800A to 1200A will replace traditional 225A-400A systems.
- There is a growing adoption of liquid cooling solutions as an effective means to address the heat generated by AI workloads, enhancing overall energy efficiency.
- The U.S. data center construction market will witness an increase in the adoption of hybrid cooling solutions, which will include a combination of air and liquid cooling.
- The U.S. data center construction market will witness data center facilities with varied densities adopted across different data halls.
- The cost of data center construction is growing at around 5% to 10% YOY, which is expected to continue, with the average cost per MW reaching \$12 million by 2030
- The dearth of skilled workers will worsen with the market growing at a rate more significant than before. With tens of projects being carried out simultaneously, the lack of skilled workers in the U.S. construction market will continue to grow, especially in key locations such as Virginia, Georgia, Texas, and Arizona.
- The U.S. data center construction market will witness new companies entering data center sub-contractor space and with development moving toward the Tier III market, sub-contractors in those locations will be able to earn millions of dollars in revenue.
- The use of AI to monitor data centers will continue to grow among data centers in the United States.

### -□Facility Type

- o□Hyperscale Data Centers
- o□Colocation Data Centers
- o□Enterprise Data Centers
- Infrastructure
  - o□Electrical Infrastructure
  - o□Mechanical Infrastructure
  - o□General Construction
- Electrical Infrastructure
  - o□UPS Systems
  - o□Generators
  - o□Transfer Switches & Switchgears
  - o□PDUs
  - o□Other Electrical Infrastructure
- Mechanical Infrastructure
  - o□Cooling Systems

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- o Racks
- o Other Mechanical Infrastructure
  - Cooling System
- o CRAC & CRAH Units
- o Chillers Units
- o Cooling Towers, Condensers, and Dry Coolers
- o Other Cooling Units
  - Cooling Techniques
- o Air-based Cooling Technique
- o Liquid-based Cooling Technique
  - General Construction
- o Core & Shell Development
- o Installation & Commissioning Services
- o Engineering & Building Design
- o Fire Detection & Suppression
- o Physical Security
- o DCIM/BMS Solutions
  - Tier Standards
- o Tier I & Tier II
- o Tier III
- o Tier IV

## U.S. DATA CENTER CONSTRUCTION MARKET GEOGRAPHICAL ANALYSIS

- Northern Virginia continues to dominate the data center growth, with strong contributions from local counties such as Fairfax, Loudoun, and Prince William counties. Over 9 GW of data center capacity is expected to be added across North Virginia during 2025-2030.
- Texas is the second-largest data center market in the United States. Cities like Dallas, Austin, Irving, San Antonio, and Houston are attracting hyperscale self-built and colocation investments. In 2024, Texas contributed to a data center capacity addition of around 350 MW, with colocation contributing to over 60% of the capacity additions.
- In 2024, Georgia has gained significant momentum in data center supply, particularly in Atlanta and surrounding areas like Lithia Springs and Douglasville. The market has transitioned from a Tier-II status to a key destination due to the availability of land and power. The market is expected to witness a capacity addition of over 2.2 GW during 2025-2030.
- Arizona, particularly Phoenix, continues to become an attractive location for colocation and hyperscale development due to better power availability, lower disaster risks, and cost efficiency. Locations like Mesa, Goodyear, and Chandler also continue to witness significant growth.
- Illinois, with key locations such as Chicago, Elk Grove Village, and Aurora, is growing as a Midwest data center hub. The strategic location of Chicago and demand from cloud service providers drives persistent growth.
- Oregon, with locations like Portland and Hillsboro, is one of the fastest-growing data center markets. Abundant power, business-friendly tax policies, and cool climates support sustainable cooling methods.
- New York/New Jersey, while constrained by space for hyperscale development, remains a key market for colocation facilities. The Northeast region is poised for growth in edge data center facilities, particularly in areas with space constraints.
- Geography
  - o Southeastern U.S.
  - o Midwestern U.S.
  - o Southwestern U.S.

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- o Western U.S.
- o Northeastern U.S.

## VENDOR LANDSCAPE

- The U.S. data center construction market hosts major global colocation operators such as Equinix, Digital Realty, QTS Realty Trust, CyrusOne, Aligned Data Centers, DataBank, Iron Mountain, Vantage Data Centers, and STACK Infrastructure. The competition among these operators has intensified with AI demand skyrocketing the demand for capacity across all key markets.
- The U.S. data center construction market has witnessed several new entrants, as well as Bitcoin companies, entering space to support AI workload deployment. Operators with significant land and power resources will dominate in terms of growth compared to others.
- The entry of new players in the U.S. data center construction market, such as Corscale Data Centers, Crane Data Centers, Edged Energy, Rowan Digital Infrastructure, NE Edge, and Quantum Loophole intensifies competition. PowerHouse Data Centers and Corscale Data Centers are notable for their major developments in Northern Virginia.
- The U.S. data center construction market will witness an increase in powered shell data center development compared to turnkey and fully fitted data centers. It will continue to see the entry of new providers with access to land and power, who will rent the space to other data center operators by constructing only the core and shell, reducing investment and increasing ROI.
- Leading hyperscale operators, including AWS, Microsoft, Meta, and Google continue to expand their self-built presence across top U.S. data center markets, which are likely to co-exist throughout the forecast period.
- The American Midwest emerges as a cost-effective alternative to coastal markets, offering strategic connectivity and reliable infrastructure, attracting colocation and hyperscale operators alike.

### Key Data Center Support Infrastructure Providers

- ABB
- Delta Electronics
- Eaton
- Legrand
- Rolls-Royce
- Schneider Electric
- Stulz
- Vertiv

### Key Data Center Contractors

- AECOM
- Ames Construction
- Arup
- Barge Design Solutions
- Burns & McDonnell
- Corgan
- Clayco
- DPR Construction
- Fortis Construction
- Haydon
- Holder Construction
- Jacobs

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- []KDC
- []Kiewit Corporation
- []Lewis Michael Consultants
- []Morgan Construction
- []Morgan Corp
- []Page
- []Rogers-O'Brien Construction
- []Rosendin Electric
- []Syska Hennessy Group
- []Turner Construction

#### Key Data Center Investors

- []Apple
- []Applied Digital
- []AWS (Amazon Web Services)
- []CyrusOne
- []DataBank
- []Digital Realty
- []Equinix
- []Google
- []Meta (Facebook)
- []Microsoft
- []NTT Data

#### Other Data Center Support Infrastructure Providers

- []Airedale
- []Alfa Laval
- []Asetek
- []Bloom Energy
- []Carrier
- []Condair
- []Cormant
- []Cyber Power Systems
- []Enlogic
- []FNT Software
- []Generac Power Systems
- []Green Revolution Cooling (GRC)
- []Hitec Power Protection
- []Johnson Controls
- []Kohler
- []KyotoCooling
- []Mitsubishi Electric
- []Natron Energy
- []NetZoom
- []Nlyte Software

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- []Rittal
- []Siemens
- []Trane (Ingersoll Rand)
- []Tripp Lite
- []Yanmar (HIMOINSA)
- []ZincFive

#### Other Data Center Contractors

- []Alfatech
- []Black & Veatch
- []Bluescope Construction
- []Brasfield & Gorrie
- []CallisonRTKL
- []Clark Construction Group
- []Climatec
- []Clune Construction
- []Emcor Group
- []EYP McF
- []Fitzpatrick Architects
- []Fluor Corporation
- []Gensler
- []Gilbane Building Company
- []Gray
- []HDR
- []Hensel Phelps
- []Hitt Contracting
- []Hoffman Construction
- []J E Dunn Construction
- []J HET Architects
- []KW Engineering
- []Walbridge
- []WSP (KW Mission Critical Engineering)
- []Linesight
- []M+W Group (Exyte)
- []McCarthy Building Companies
- []Morrison Hershfield
- []Mortenson
- []Pepper Construction
- []Rosendin
- []Ryan Companies
- []Salute Mission Critical
- []Sheehan Nagle Hartray Architects
- []Skanska
- []Southland Industries
- []Sturgeon Electric Company
- []Structure Tone

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- []Suffolk Construction
- []Sundt Construction
- []The Mulhern Group
- []The Walsh Group
- []The Weitz Company
- []Trinity Group Construction

#### Other Data Center Investors

- []Aligned Data Centers
- []American Tower
- []Aubix
- []Centersquare
- []CloudHQ
- []Cologix
- []Compass Datacenters
- []COPT Data Center Solutions
- []Core Scientific
- []Corscale Data Centers
- []DartPoints
- []DC Blox
- []DigiPowerX (DigiHost)
- []EdgeConnex
- []EdgeCore Digital Infrastructure
- []Element Critical
- []Flexential
- []FifteenFortySeven Critical Systems Realty (1547)
- []H5 Data Centers
- []HostDime
- []Hut 8
- []Iron Mountain
- []Netrality Data Centers
- []Novva Data Centers
- []PhoenixNAP
- []Powerhouse Data Centers
- []Prime Data Centers
- []QTS Realty Trust
- []Sabey Data Centers
- []Skybox Datacenters
- []Stream Data Centers
- []Stack Infrastructure
- []Switch
- []T5 Data Centers
- []TierPoint
- []Vantage Data Centers
- []Yondr
- []365 Data Centers

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-□5C Data Centers

## New Entrants

- Ardent Data Centers
- Colovore
- Cloudburst Data Centers
- Crane Data Centers
- Edged Energy
- NE Edge
- Prometheus Hyperscale
- Quantum Loophole
- Rowan Digital Infrastructure
- Tract

## KEY QUESTIONS ANSWERED:

- 1.□How big is the U.S. data center construction market?
- 2.□What is the estimated market size in terms of area in the U.S. data center construction market by 2030?
- 3.□What is the growth rate of the U.S. data center construction market?
- 4.□What are the key trends in the U.S. data center construction market?
- 5.□How many MW of power capacity is expected to reach the U.S. data center construction market by 2030?

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