

U.S. Data Center Market Landscape 2025-2030

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Report description:

The U.S. data center market size by investment is expected to grow at a CAGR of 6.78% from 2024 to 2030.

US DATA CENTER MARKET KEY TRENDS

Al Transforming the Landscape of the U.S. Data Center Market

- The AI market is set to significantly increase the size of hyperscale data centers. Even though the current AI investments haven't fully compensated for the growth in hyperscale data centers, the capacity of these data centers, especially for AI workloads, is expected to almost triple in the next six years.

-[In FY 2025, Microsoft is expected to spend \$80 billion to build out AI data centers to run AI training models as well as its cloud operators worldwide.

Sustainability Initiatives by Data Center Operators

-[In February 2025, Microsoft and Clearloop partnered to deploy 100 MW of solar projects for the next three years in underinvested communities in the U.S., which include states like Arkansas and Louisiana.

-[In September 2024, Google announced the signing of PPAs to acquire solar energy in Nebraska and Texas, with the carbon removal deal in Brazil. In collaboration with the Omaha Public Power District, Google secured an agreement with NextEra Energy to source carbon-free energy from the 420MW Pierce County Energy Center in Nebraska, set to become operational in 2027.

Rise in Rack Power Density

- One of the most critical factors influencing data center design and construction in the U.S. is the rapid increase in IT equipment rack power density. Over the past several years, the adoption of compute-intensive workloads such as AI, IoT, AR, VR, and cryptocurrency mining has significantly increased the demand for data storage and processing power. These trends drive the

need for high-density racks, which can support far more power-intensive operations than traditional racks. -[]As data center demand continues to rise, driven by the rapid expansion of AI, cloud computing, and other data-intensive technologies, the U.S. data center construction market is set for significant growth. Hyperscale facilities, with their ability to support power capacities exceeding 30 MW and power densities between 10 kW and 20 kW per rack, are expected to dominate the market.

Liquid Cooling Solutions for AI/ML Workloads

-[There is an increasing focus on sustainable and innovative data center technologies. With the growing awareness of computing power requirements and performance expectations continue to rise, driven by the advancements in technologies including Artificial Intelligence (AI), the Internet of Things (IoT), and Machine Learning (ML), the demand for power usage will increase; this will result in elevated temperatures in data center IT infrastructure.

-[In March 2025, Crypto and AI data center company IREN announced its plans to develop a 75 MW AI data center in Texas. They are planning to deploy a new 75 MW liquid-cooling data center for AI/High-performance computing at its Childress site in Texas. It will be designed to support 200 kW per rack via direct-to-chip cooling for NVIDIA's Blackwell GPUs.

Innovative Data Center Technologies in the U.S. Data Center Market

-[There is a growing focus on sustainable and innovative data center technologies in the U.S. data center market, with the increasing awareness of environmental concerns and energy efficiency, data center operators continue to invest in cutting-edge solutions. This includes the adoption of renewable energy sources such as solar and wind power to reduce the carbon footprint. -[Cummins offers lean-burn natural gas engine generator sets spanning 315 KW to 2 MW in size. These generators run on natural gas and exhibit minimal emissions, making them well-suited for both primary power and combined heat and power uses.

Adoption of Advanced UPS Batteries

-[In recent years, manufacturers introduced Li-ion batteries that have been specifically designed for use in UPS applications. These Li-ion batteries have become a practical and efficient alternative to traditional lead-acid batteries to enhance performance and cost-effectiveness over time. For instance, NTT DATA has adopted Li-ion batteries with a five-minute run time at full load in its data center in Chicago (CH1).

- The battery vendors are also continuing to innovate their solutions for data centers. For instance, ZincFive launched the new BC 2 battery cabinet; it has been specifically designed to store a substantial amount of power in data centers.

U.S. TARIFF IMPACT ON GLOBAL DATA CENTER MARKET

-[A trade war refers to an economic conflict in which countries impose tariffs or other trade barriers against each other, typically as a response to similar actions taken by the opposing party. Currently, the world is witnessing the emergence of a global trade war, sparked by the US's imposition of tariffs on the growing list of countries.

-[The recent tariff war has posed a challenge for data center infrastructure, particularly in sourcing raw materials, as increased import and export taxes are expected to raise overall infrastructure costs. For example, the United States has imposed tariffs of around 245% on China, which will increase the cost of equipment imported from China and nearby regions. In response, China has imposed tariffs of around 125% on the United States, which will raise the cost of materials such as electronic equipment that China imports from the U.S.

-[Materials such as lithium-ion, nickel, and zinc, which are essential for UPS batteries, may see a rise in prices due to increased tariffs. Key infrastructure likely to be impacted by these tariffs includes UPS systems, generators, cooling systems, and IT infrastructure equipment, including semiconductor components. Consequently, the increase in product pricing and supply chain challenges resulting from the tariff war will raise the overall capital expenditure (CAPEX) for data center projects.

- The rise in the cost of construction materials will affect construction budgets, cause delays in the supply chain, and introduce other logistical challenges. These increasing costs will place a greater burden on small and medium-sized data center operators, who typically operate with lower profit margins.

- As a result, operators in the U.S. data center market may start exploring alternative strategies, such as using materials produced domestically at lower costs.

UNITED STATES DATA CENTER MARKET SEGMENTATION INSIGHTS

- Hyperscale self-built data centers continue to grow in the U.S. data center market with increased demand for AI workloads among cloud and technology service providers. These companies identify suitable locations to bring campuses with hundreds of megawatts online within the next few years.

- The U.S. data center market is witnessing significant growth due to substantial investments in Al-ready data centers. This expansion is driving an increased demand for high-performance computing servers equipped with GPUs and TPUs, which are essential for handling the intensive workloads associated with artificial intelligence applications. IT infrastructure in the U.S. data center market is expected to grow at a CAGR of 3.46%.

-[In the U.S. data center market, the market is witnessing growth in the adoption of both air and liquid-based cooling techniques. The liquid-based cooling technique is expected to witness significant growth in terms of cooling techniques, with the growth rate of around 167.29% between 2025-2030, growing at a CAGR of around 24.20%.

- Direct chip cooling has gained increased traction in the U.S. data center market. This has led to the strong growth of coolant distribution units (CDU) and rear door heat exchangers in combination with dry coolers and cooling towers.

-[The U.S. data center market is witnessing significant growth in terms of electrical infrastructure investment, with a growth rate of 96.37% between 2023 and 2024. Additionally, the market is expected to witness significant growth in terms of electrical investment, with a growth rate of 88.54% between 2025 and 2030.

-[Traditionally, VRLA batteries have been adopted by data center operators. However, data center operators are now moving towards lithium-ion batteries and nickel-zinc batteries. For instance, ABB, Vertiv, and Schneider Electric are major providers of lithium-ion batteries.

Segmentation by Facility Type - Hyperscale Data Centers - Colocation Data Centers -∏Enterprise Data Centers Segmentation by Infrastructure IT Infrastructure Electrical Infrastructure - Mechanical Infrastructure - General Construction Segmentation by IT Infrastructure - Server Infrastructure - Storage Infrastructure Network Infrastructure Segmentation by Electrical Infrastructure - UPS Systems Generators Transfer Switches & Switchgear - Power Distribution Units - Other Electrical Infrastructure Segmentation by Mechanical Infrastructure

- Cooling Systems -∏Racks - Other Mechanical Infrastructure Segmentation by Cooling Systems - CRAC & CRAH Units - Chiller Units - Cooling Towers, Condensers, and Dry Coolers Other Cooling Units Segmentation by Cooling Techniques -∏Air-based - Liquid-based Segmentation by General Construction -□Core & Shell Development - Installation & Commissioning Services - Engineering & Building Design Physical Security - Fire Detection & Suppression - DCIM/BMS Segmentation by Tier Standard -∏Tier I & II -[]Tier III -[]Tier IV

GEOGRAPHICAL ANALYSIS

-[In the U.S. data center market, the Southeastern U.S. is expected to be the largest market in 2030 in terms of power capacity, with a share of around 35% in 2030, followed by Midwestern U.S.

-[Virginia has seen the highest hyperscale investments in the year 2024, followed by other states. Hyperscale operators such as Microsoft, Amazon Web Services, and Google have poured their investments and the highest power capacity into the state. -[Midwestern states have proactively implemented a variety of tax incentives and regulatory measures designed to attract data center investments. States such as Illinois, Iowa, and Ohio offer substantial tax breaks on equipment purchases and operational expenditures, enhancing their attractiveness to operators. These incentives not only lower the initial capital outlay but also create a conducive environment for sustainable growth and innovation within the data center sector.

-[The Southwestern U.S. includes states such as Texas, Arizona, New Mexico, and Oklahoma. Among these four states, Texas and Arizona contribute to over 90% of the data center market investments. Texas and Arizona witness investments by colocation operators and hyperscale self-built facilities. Many bitcoin operators in the Texas market are also investing in data centers to support Al workloads.

- In 2024, the Western U.S. witnessed the highest colocation investment in Oregon state followed by California and Utah. Also, the states of Oregon, Washington, and Nevada witnessed a lot of investments and projects flowing from hyperscale operators such as Google, Microsoft, and Meta.

- The demand for data centers in the New York-New Jersey market remains high. This has driven down vacancies to less than 6%. The expansion of the New York-New Jersey data center market can be attributed to the ongoing demand for data center space, thereby serving as a connectivity hub in the heart of New York City's financial center.

Segmentation by Geography -[]The U.S. -[]South-Eastern U.S.

- South-Western U.S. - Western U.S. - Mid-Western U.S. - North-Eastern U.S.

U.S. DATA CENTER MARKET VENDOR LANDSCAPE

- [Key players in the IT infrastructure in the U.S. data center market include Arista Networks, Atos, Broadcom, Cisco Systems, Dell Technologies, Extreme Networks, Fujitsu, Hewlett Packard Enterprise, IBM, NetApp, Oracle, Pure Storage, Super Micro Computer, and other that provide services IT infrastructure to the data centers.

- [Key players in the power infrastructure in the U.S. data center market include ABB, Eaton, Schneider Electric, Legrand, Vertiv, Cummins, and Caterpillar. These companies lead the market, driving advancements in power systems to ensure efficiency and reliability.

-[Clayco, HITT Contracting, DPR Construction, Corgan, Turner Construction, Jacobs, and Holder Construction are some of the major contractors in the data center construction market, known for their extensive experience in delivering complex projects. -[]The increasing data center construction is aiding in millions of revenue from the sector to the major civil contractors and subcontractors in the U.S.

-[]Hyperscale operators like Meta (Facebook), Google, Microsoft, AWS, and Apple are contributing to over 40% of the total investments in the market. The competition among these operators in acquiring land, power, and capacity in colocation facilities is currently at an all-time high.

-[]Several colocation data center operators, including Equinix, Digital Realty, CyrusOne, Vantage Data Centers, NTT Data, STACK Infrastructure, Switch, DataBank, and QTS Realty Trust, are major investors in the U.S. data center market. Many of these companies are competing with new entrants in supporting multi-megawatt requirements across key data center destinations in the country.

- The U.S. data center market will witness new companies entering the 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.

IT Infrastructure Provider

Arista Networks Atos
Broadcom - Cisco Systems DataDirect Networks (DDN) - Dell Technologies - Extreme Networks - Fujitsu - Hewlett Packard Enterprise - Hitachi Vantara, -∏IBM - Infortrend Technology -[Inspur -∏Intel - Lenovo Micron Technology - MiTAC Holdings -[NetApp

- [Nimbus Data - [NVIDIA - [Oracle - [Pure Storage - [Quanta Cloud Technology - [QNAP Systems - [Quantum - [Seagate Technology - [Silk - [Super Micro Computer - [Synology - [Toshiba - [Western Digital - [Wiwynn - [Hon Hai Technology Group (Foxconn)

Key Data Center Support Infrastructure Providers

-[]ABB

-[]Caterpillar

-[]Cummins

- Delta Electronics

-∏Eaton

-[]Legrand

-[Rolls-Royce

Schneider Electric

-[]STULZ

-[]Vertiv

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 (Rehlko) - KyotoCooling

- Mitsubishi Electric

- Natron Energy
- -[]NetZoom
- Nlyte Software
- -[Rittal
- -[]Siemens
- -[]Trane

-[]ZincFive,

- HIMOINSA (Yanmar)

Key Data Center Construction Contractors

- AECOM - Ames Construction -[]Arup - Barge Design Solutions -[]Burns & McDonnell -[]Corgan - DPR Construction - Fortis Construction -[]Haydon - Holder Construction -∏lacobs -[]KDC - Kiewit Corporation - Lewis Michael Consultants Morgan Construction -[]Morgan Corp -[]Page - Rogers-O'Brien Construction - Rosendin Electric - Syska Hennessy Group Turner Construction

Other Data Center Construction Contractors

-[AlfaTech -[Black & Veatch -[BlueScope Construction -[Brasfield & Gorrie -[CallisonRTKL -[Clark Construction Group -[Clayco -[Climatec -[Clune Construction -[EMCOR Group -[EYP MCF

- Fitzpatrick Architects - Fluor Corporation -[]Gensler - Gilbane Building Company -[]Gray -∏HDR - Hensel Phelps -[]HITT Contracting - Hoffman Construction IE Dunn Construction -[]]HET Architects, - kW Engineering -[Walbridge -[]WSP -[]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 - Suffolk Construction Sundt Construction The Mulhern Group -[]The Walsh Group The Weitz Company - TRINITY Group Construction

Data Center Investors

-[Apple -[Applied Digital -[AWS -[CyrusOne -[DataBank -[Digital Realty -[Equinix -[Google -[Meta (Facebook) -[Microsoft

- NTT DATA - Aligned Data Centers American Tower - AUBix -[]CloudHQ - Cologix - Compass Datacenters - COPT Data Center Solutions -[]CoreSite -∏Core Scientific DartPoints - DC BLOX DigiPower X - Edge Centres -[]EdgeConneX - EdgeCore Digital Infrastructure - Element Critical -[Evoque -[]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 - Sabey Data Centers - QTS Realty Trust - Skybox Datacenters STACK Infrastructure -[]Switch - T5 Data Centers -[]TierPoint - Vantage Data Centers -[]Yondr -[]365 Data Centers -[]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 market?
 2. What is the growth rate of the U.S. data center market?
 3. What is the estimated market size in terms of area in the U.S. data center market by 2030?
 4. What are the key trends in the U.S. data center market?
 5. How many MW of power capacity is expected to reach the U.S. data center market by 2030?

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