

## **North America Green Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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### **Report description:**

North America Green Data Center Market Analysis

The North America green data center market size reached USD 47.6 billion in 2025 and is on track to hit USD 109.3 billion by 2030, expanding at an 18.08% CAGR. Escalating AI workloads that consumed 176 TWh of electricity in 2023, wide-scale renewable power purchase agreements (PPAs), and aggressive hyperscale investment plans underpin this advance energy.gov. Hyperscale cloud platforms continue to build multi-gigawatt campuses, pulling forward demand for high-density liquid cooling and on-site clean energy generation. Colocation operators are racing to satisfy corporate net-zero mandates, weaving sustainability metrics into service-level agreements that now influence the majority of North American requests for proposal. Grid interconnection delays and skilled-labor gaps remain headwinds, yet executive-level policy support combined with technology breakthroughs in AI-driven airflow optimisation sustain the market's momentum through the decade.

North America Green Data Center Market Trends and Insights

Soaring hyperscale build-outs across North America

Hyperscale operators are pouring capital into gigawatt-scale campuses that integrate on-site solar, natural-gas peaker plants, and nuclear energy allocations. Apple committed USD 500 billion for AI-ready facilities across Texas, California, and North Carolina, echoing Microsoft's USD 80 billion North American expansion plan. Meta is channeling USD 10 billion into a Louisiana complex supported by up to 4 GW of baseload nuclear capacity. Infrastructure Masons forecasts clean-energy parks capable of hosting 10

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GW clusters, positioning the region as the global benchmark for sustainable hyperscale development. This arms race underwrites the 24.4% CAGR for hyperscale capacity within the North America green data center market.

#### Corporate net-zero mandates reshaping colocation RFPs

Enterprises now rank renewable-energy alignment ahead of latency or price when choosing colocation partners. Iron Mountain has matched 100% of its data-center load with renewables since 2017 and built North America's first BREEAM-certified site, driving new procurement benchmarks. Microsoft's 2030 carbon-negative pledge and 2025 100% renewable coverage requirement cascade through supply chains, pushing vendors to adopt sustainability-linked loans and science-based targets. Providers demonstrating verifiable carbon reductions gain preferred-bidder status, elevating environmental performance to a decisive competitive lever.

#### Up-front capex premium of sustainable materials

Low-carbon concrete, mass timber, and electric-arc-furnace steel still price at double-digit premiums. Microsoft's pilot in Quincy cut embodied carbon by 50% but required bespoke mixes available from only a handful of suppliers. Amazon disclosed extra capex for lower-carbon steel across 43 new centres, even after accounting for volume discounts. While long-run energy and brand benefits offset these costs, developers in high-priced metros struggle to make projects pencil without green-bond proceeds or tax incentives.

Other drivers and restraints analyzed in the detailed report include:

Utility-level renewable PPA price declines / AI-driven airflow optimisation cutting OpEx / Regional grid congestion and interconnection backlog /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Solutions continued to dominate the North America green data center market, holding 63.1% revenue in 2024 as operators invested in efficient power, liquid cooling, and AI-enabled management platforms. This dominance delivers scale economies, but growth moderates as procurement shifts toward standardised, lower-margin hardware. Services, by contrast, are forecast to expand at 22.1% CAGR because net-zero roadmaps require continuous optimisation, carbon accounting, and compliance audits. Managed sustainability offerings now bundle real-time energy dashboards with advisory support that aligns facilities with Science-Based Targets.

Operators paying premium rates for system integration expect seamless cut-over from air-cooled halls to direct-to-chip loops without downtime. These complex retrofits rely on specialist firms that can design fluid networks, process leak detection data, and minimise embodied emissions. As a result, services revenue per kilowatt is rising even as equipment pricing faces deflationary pressure, underpinning a resilient long-term mix within the North America green data center market.

Hyperscalers captured 36.1% of the North America green data center market size in 2024, thanks to AI workload intensity and vertically integrated clean-energy procurement. Their 24.4% CAGR to 2030 draws on massive forward contracts for wind, solar, small-modular nuclear, and gas-peaking assets that smaller peers cannot match. These players increasingly pre-fabricate electrical rooms and liquid-cooling manifolds, shrinking construction cycles to meet AI product-launch windows.

Colocation providers are retooling campuses to win hyperscale spill-over deals. New builds feature 100 MW blocks with waterless

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cooling, sustainability-linked lease clauses, and direct fibre to major cloud on-ramps. Edge and enterprise sites, while smaller, focus on latency-sensitive workloads such as telemedicine and gaming. Their investment in renewable micro-grids illustrates how decentralised sites can still exceed corporate-average carbon goals, broadening the addressable pool for the North America green data center market.

North America Green Data Center Market Report Segments the Industry Into Service (System Integration, Monitoring Services, Professional Services, Other Services), Solution (Power, Servers, Management Software, and More), User (Colocation Providers, Cloud Service Providers, Enterprises), and End-User Industry (Healthcare, Financial Services, Government, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Schneider Electric SE / Vertiv Holdings Co / Eaton Corporation plc / Cisco Systems Inc. / Dell Technologies Inc. / Hewlett Packard Enterprise / Fujitsu Ltd / IBM Corp. / Hitachi Ltd / Equinix Inc. / Digital Realty Trust Inc. / QTS Realty Trust LLC / CyrusOne Inc. / Switch Inc. / Iron Mountain Data Centers / Amazon Web Services / Microsoft Corp. / Google LLC / Meta Platforms Inc. / Rittal GmbH and Co. KG /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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