



Data Centers:

Powering the Internet and our Modern Economy



Data Center Coalition:

- **The Voice** of the data center sector
- **Advocates** for a business climate, policies, and investments that support the growth and competitiveness of the industry
- **Information Resource** for elected officials, candidates, community leaders, and other stakeholders

Data Center Owner/Operator Members



Large End User Members

ANTHROPIC  CoreWeave OpenAI

Associate Members (Pre-Operational)

Beale Infrastructure  CleanArc™ DATA CENTERS  FLEET DATA CENTERS MONTERA INFRASTRUCTURE

Industry Advisory Council



CATERPILLAR®

CLAYCO
THE ART & SCIENCE OF BUILDING

CLUNE
CONSTRUCTION

EAT•N
Powering Business Worldwide



Johnson Controls 

MCCARTHY®

PCI mission critical

RYAN

Life Is On | Schneider Electric

 VERTIV™

2 Main Types of Data Centers

Self-Perform/Enterprise

Business owns/controls servers and peripherals, may own facility

Multitenant and Build to Suit

Facility owner leases to one or multiple tenants

Data Center Basics

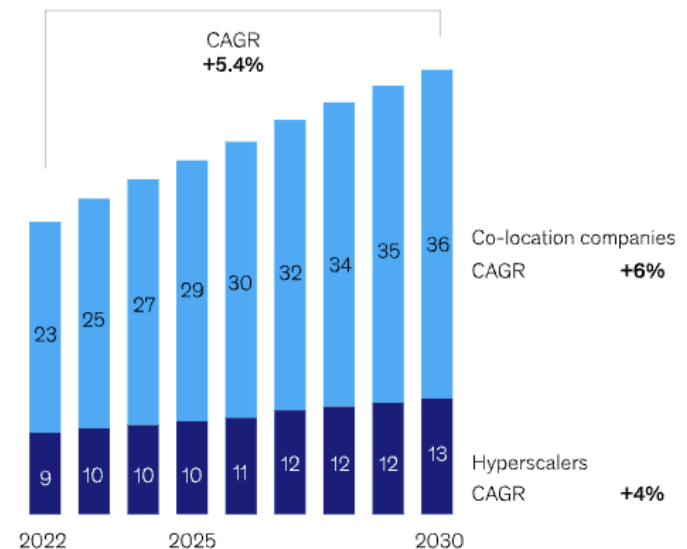
- Building Shell
- Interior Space
- Security
 - Exterior
 - Interior
 - Cyber
- Servers
- Fiber/Networking Connectivity
- Reliable Power 24/7
- HVAC/Cooling

Increasing Data Center Demand

- In the US market alone, demand—measured by power consumption to reflect the number of servers a data center can house—is expected to reach **80 gigawatts (GW) by 2030**, up from 25 GW in 2024, according to McKinsey & Company.
- The United States accounts for roughly **40 percent** of the global market.

Global spending on the construction of data centers is forecast to reach **\$49 billion by 2030**.

Data center construction spending,¹ \$ billion



¹Includes construction spending by providers. Excludes enterprise spending and any other capital expenditure outside of construction (such as equipment).
Source: Synergy Research Group

McKinsey & Company

Source: McKinsey & Company, "How data centers and the energy sector can sate AI's hunger for power", September 17, 2024, <https://www.mckinsey.com/industries/private-capital/our-insights/how-data-centers-and-the-energy-sector-can-sate-ais-hunger-for-power>



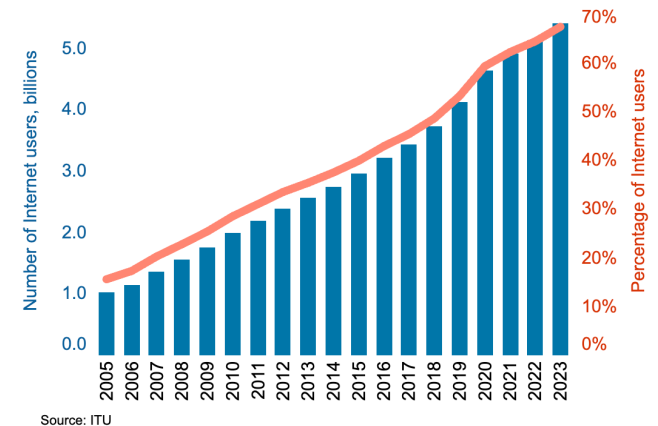
Number of People/Devices Drives Data Center Demand

"The data center industry has experienced explosive growth over the past decade, driven by ever-increasing demand for cloud services and the expanding use of web-enabled devices globally. [...] **In the next five years, consumers and businesses will generate twice as much data as all the data created over the past 10 years.**"

-JLL, *Data Centers 2024 Global Outlook*

More People Are Getting Online

- Approximately 5.4 billion people - or 67% of the global population - are online today. This represents an **increase of 45% since 2018**. 2.6 billion people are not yet connected to the internet.
- On average, U.S. households have a total of **21 connected devices**.



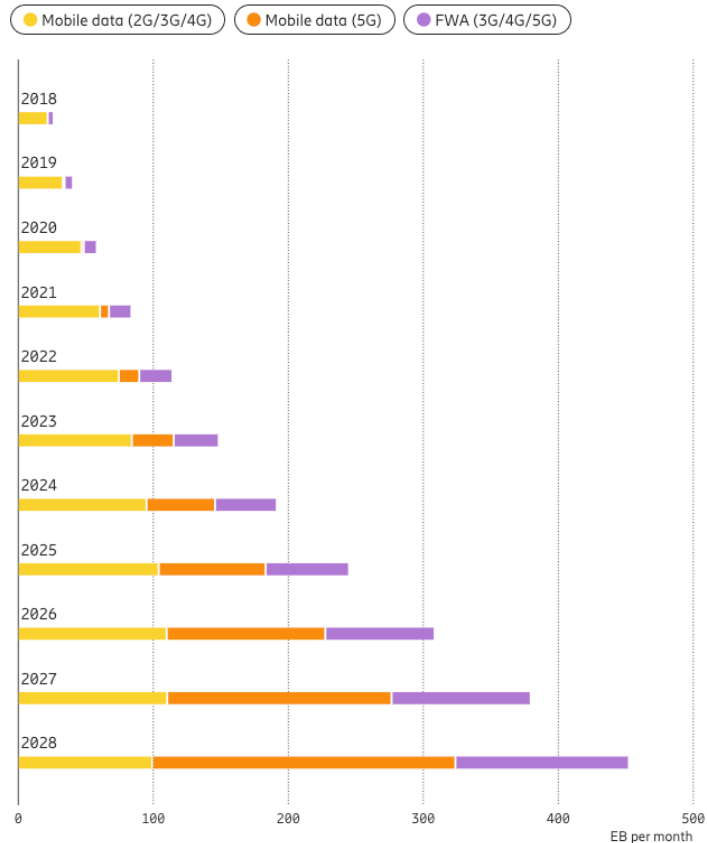
Sources: JLL, *Data Centers 2024 Global Outlook*, <https://www.us.jll.com/content/dam/jll-com/documents/pdf/research/global/jll-data-center-outlook-global-2024.pdf>

International Telecommunication Union, <https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>

Deloitte "Shiny new devices may be bringing joy, but who's protecting consumer data?", January 23, 2023 <https://www2.deloitte.com/us/en/insights/industry/technology/consumer-data-privacy.html>

Projected Growth: Global Mobile Data Traffic

Figure 19: Global mobile network data traffic



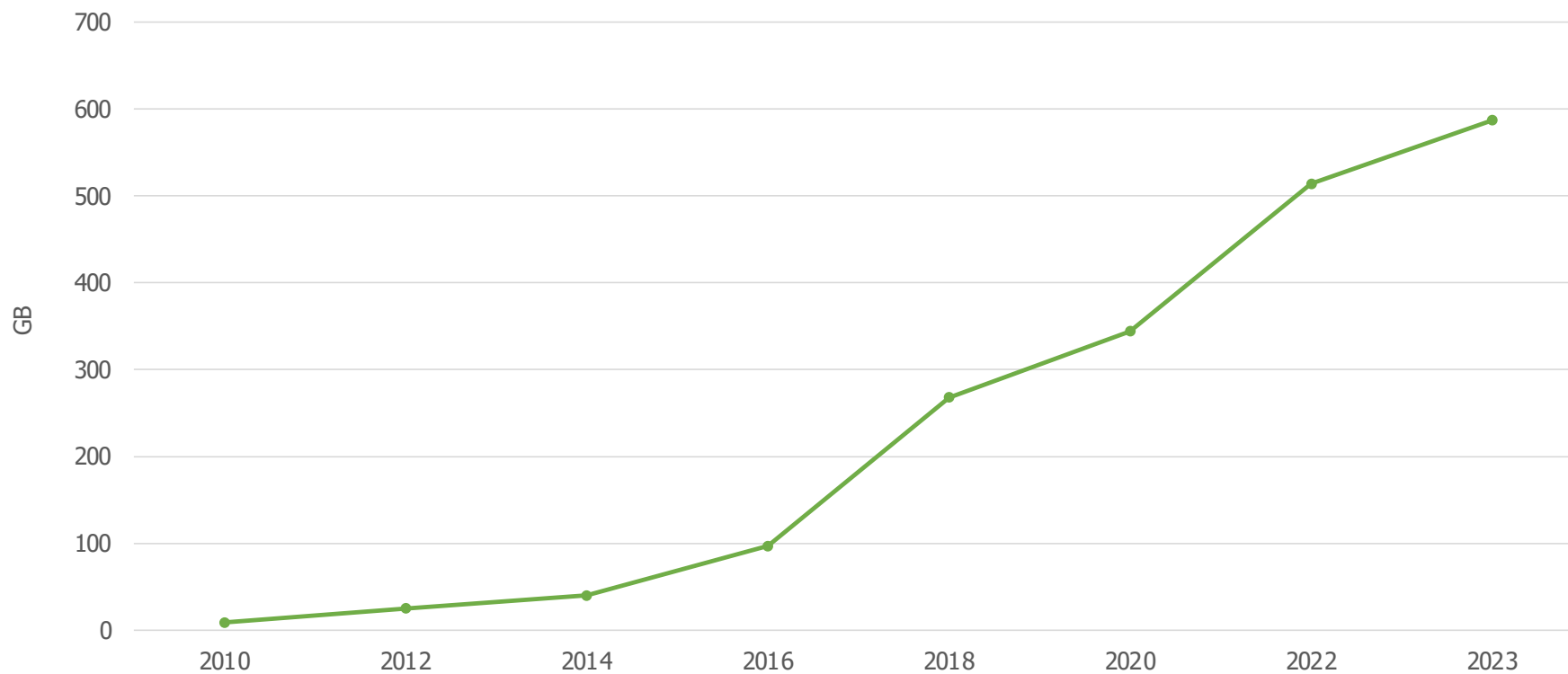
Ericsson Mobility Report Key Findings

- In 2028, all growth in mobile data traffic will come from 5G, as 4G traffic is set to decline.
- The global monthly average usage per smartphone is anticipated to be 19 GB in 2023 and is forecast to reach 46 GB by the end of 2028.
- In 2028, 5G's share of mobile data traffic is forecast to grow to 69 percent.

Source of Graphic and Data: Ericsson Mobile Data Traffic Outlook: <https://www.ericsson.com/en/reports-and-papers/mobility-report/dataforecasts/mobile-traffic-forecast>

What Drives Data Center Demand?

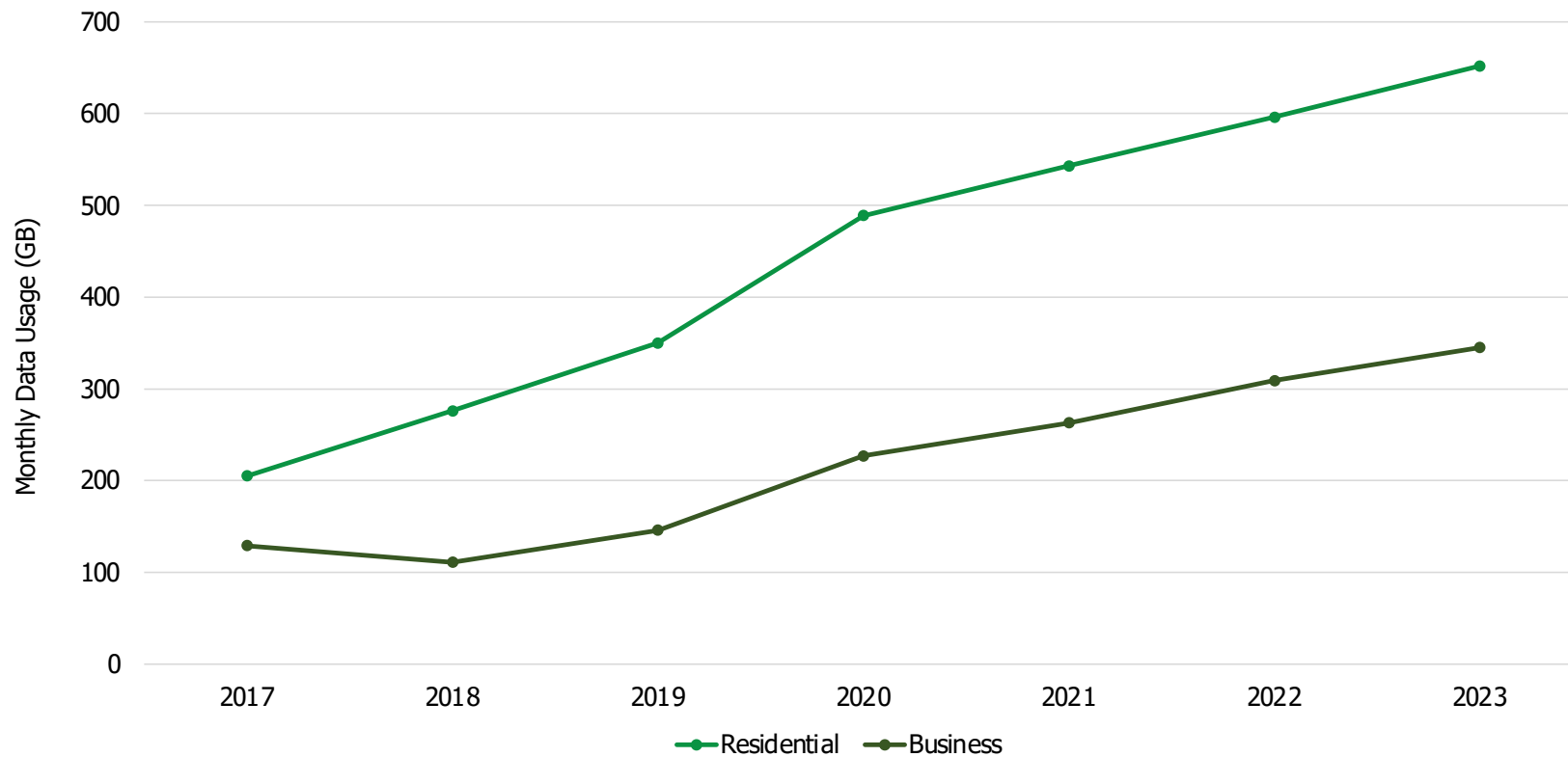
Average Monthly Household Broadband Consumption



Source: OpenVault Broadband Insights Report, OVBI Q4 2022 Report, <https://openvault.com/resources/ovbi/>



Data Usage Trends: Commercial vs. Residential – 4Q23



Source: OpenVault Broadband Insights Report, OVBI Q4 2023 Report, <https://openvault.com/resources/ovbi/>

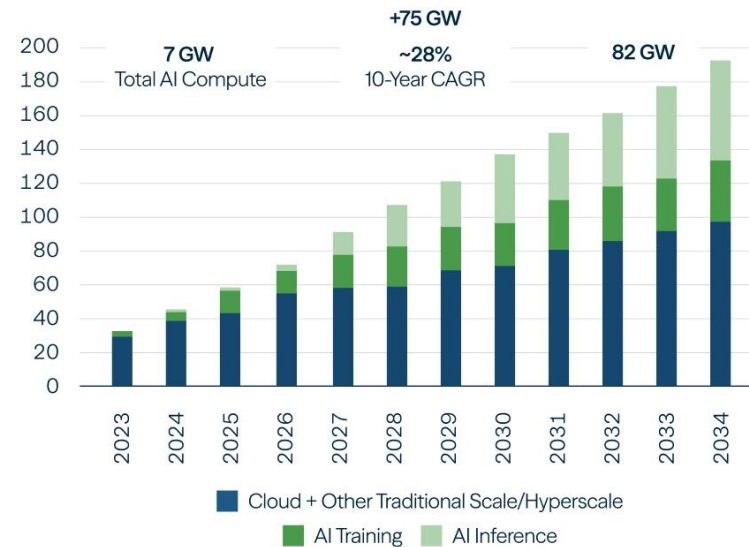


What Drives Data Center Demand?

Brookfield

Data Center Demand for Cloud vs. AI Training and Interface

Total Global Installed Base (GW)



Source: Brookfield internal research

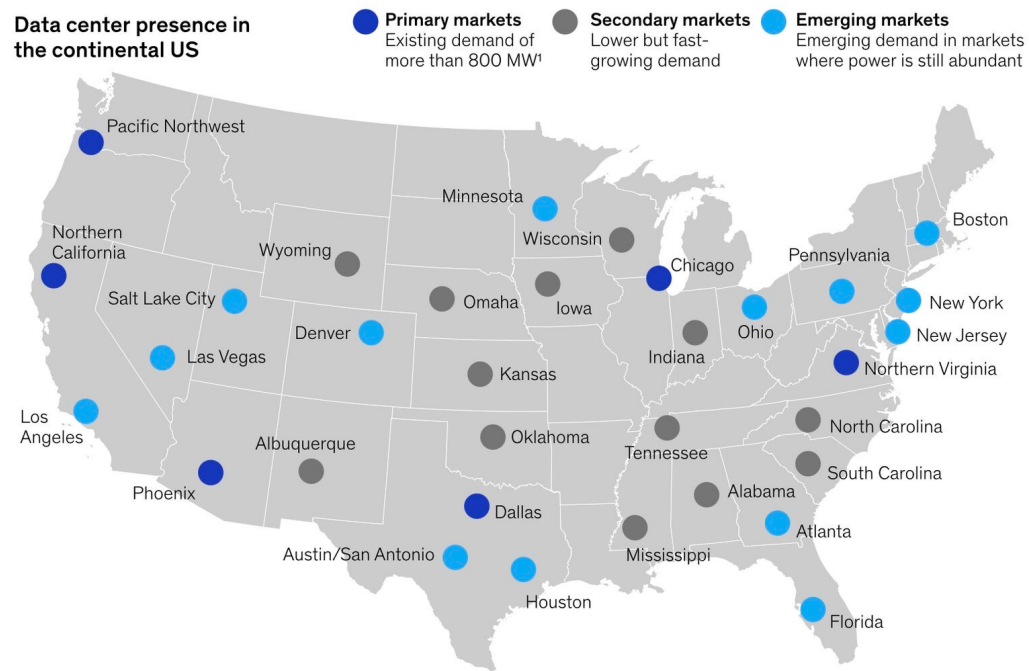
Source: Brookfield, LinkedIn, December 2025, https://www.linkedin.com/posts/brookfield_ai-data-center-capacity-is-projected-to-grow-activity-7401670262233911296-vdki?utm_source=share&utm_medium=member_desktop&rcm=ACoAAAV_ci4BPKOJbXob-Y75uZVwxo7IbW0YCow



U.S. Data Centers Markets

Data centers are emerging in more remote locations, where power is still abundant and grids less strained.

Data center presence in the continental US



¹Megawatt.

Source: Datacenters.com; S&P Global Market Intelligence 451 Research; McKinsey Data Center Demand model

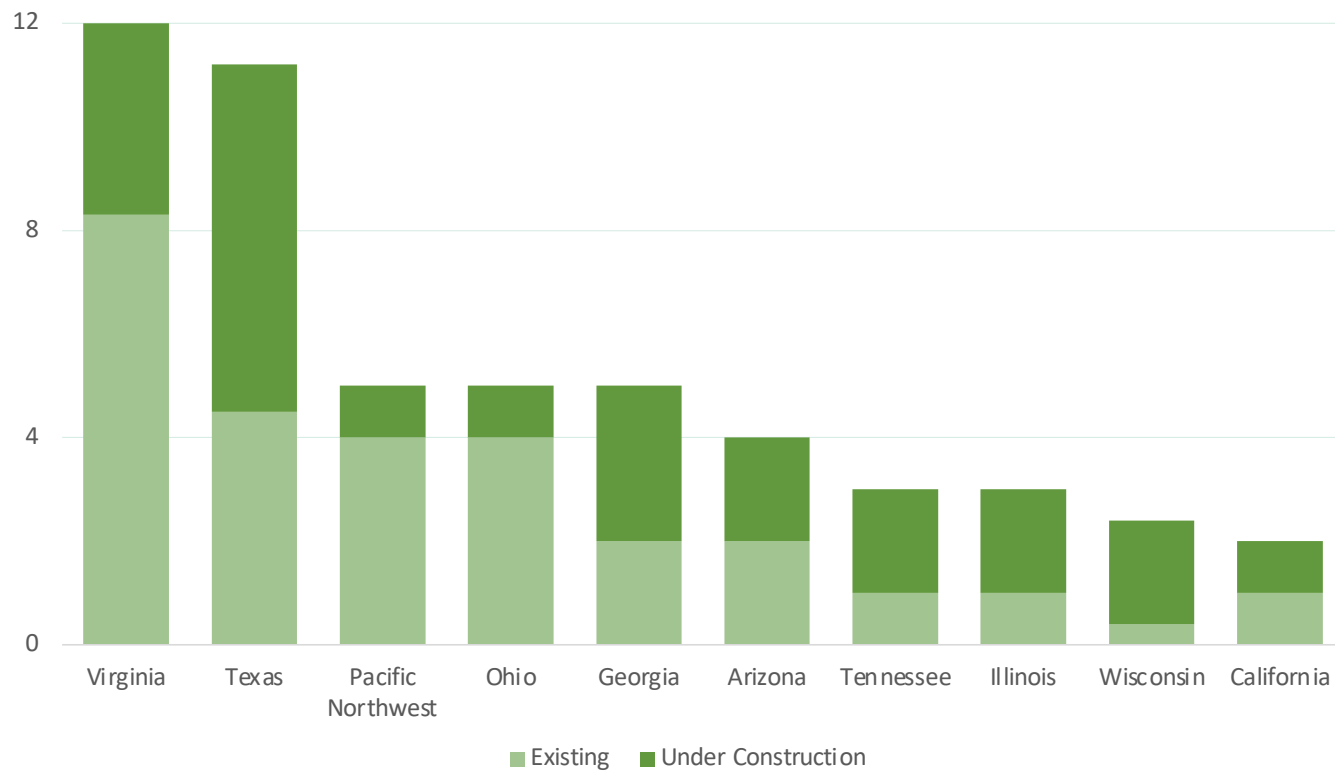
McKinsey & Company



Source: https://www.linkedin.com/posts/anaestherfranco_datacenters-digitalinfrastructure-economicgrowth-activity-7370090249177309184-i5ng/?utm_source=share&utm_medium=member_ios&rcm=ACoAAAKLw2YBeQZzHwOYXpqBV-CfxaCsFwGY_c

Data Center Market Outlook

2025 year-end leased data center
+ hyper owned capacity (GW)



[Source: JLL Research, 2026](#)



New Products/Experiences/Applications Drive Demand

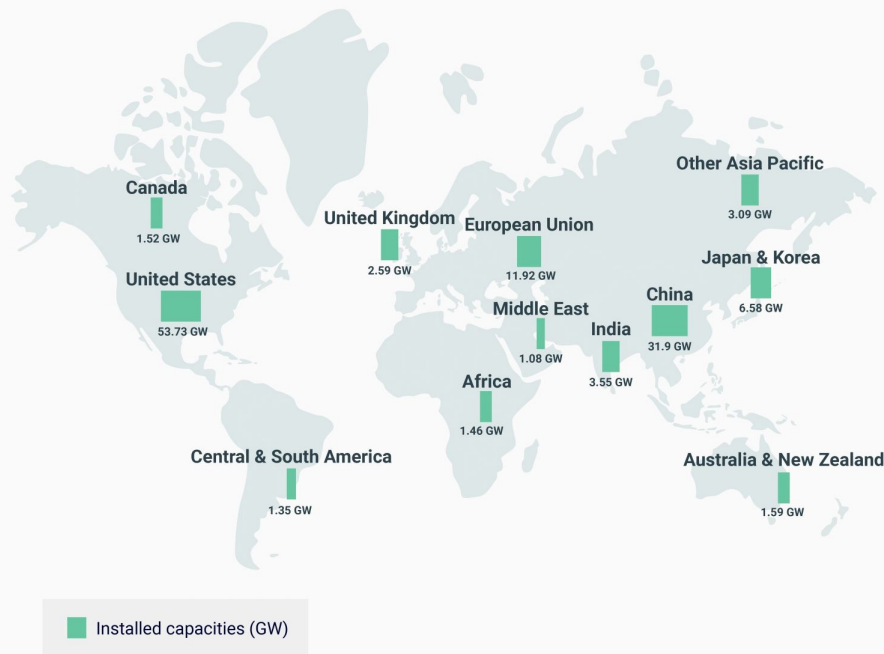
- Cloud
- Business Apps
- Generative AI
- Entertainment and Gaming
- Internet of Things/Connected Devices
- Streaming Video

- Virtual and Augmented Reality
- eCommerce
- Machine Learning
- Payment Processing
- Online Learning
- Connected Vehicles and Autonomous Driving
- Innovation!

Global Data Center Capacity

US and China Account for 70% of Data Center Installed Capacity Globally

The United States leads installed capacity with 54 GW



*Source: New Energy Consult, IEA

ENERGIZE
by New Energy

According to a New Energy Consult LinkedIn Post:

- The US and China dominate global data centers accounting for 70% of total installed capacity worldwide.
- **The United States is the largest single market with around 54 GW; 44% of global installed capacity.**
- The US is followed by China with 31.9 GW equivalent to 26% of global installed capacity.
- Europe is a strong hub with 12 GW.
- The Middle East lags behind with 1.08 GW but growth opportunities exist.

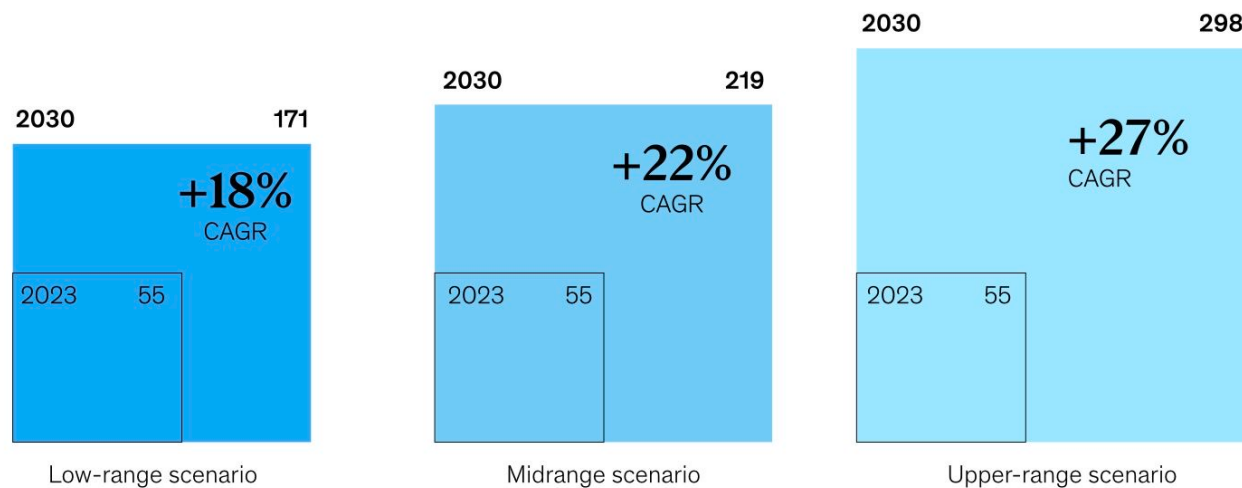


Source: https://www.linkedin.com/posts/new-energy-consult_energize-datacenters-us-activity-7367117446354333696-6ZOV/?utm_source=share&utm_medium=member_ios&rcm=ACoAAAKLw2YBeQZzzHwOYXpqBV-CfxaCsFwGY_c

Global Data Center Capacity

Global demand for data center capacity could more than triple by 2030.

Demand for data center capacity,¹ gigawatts



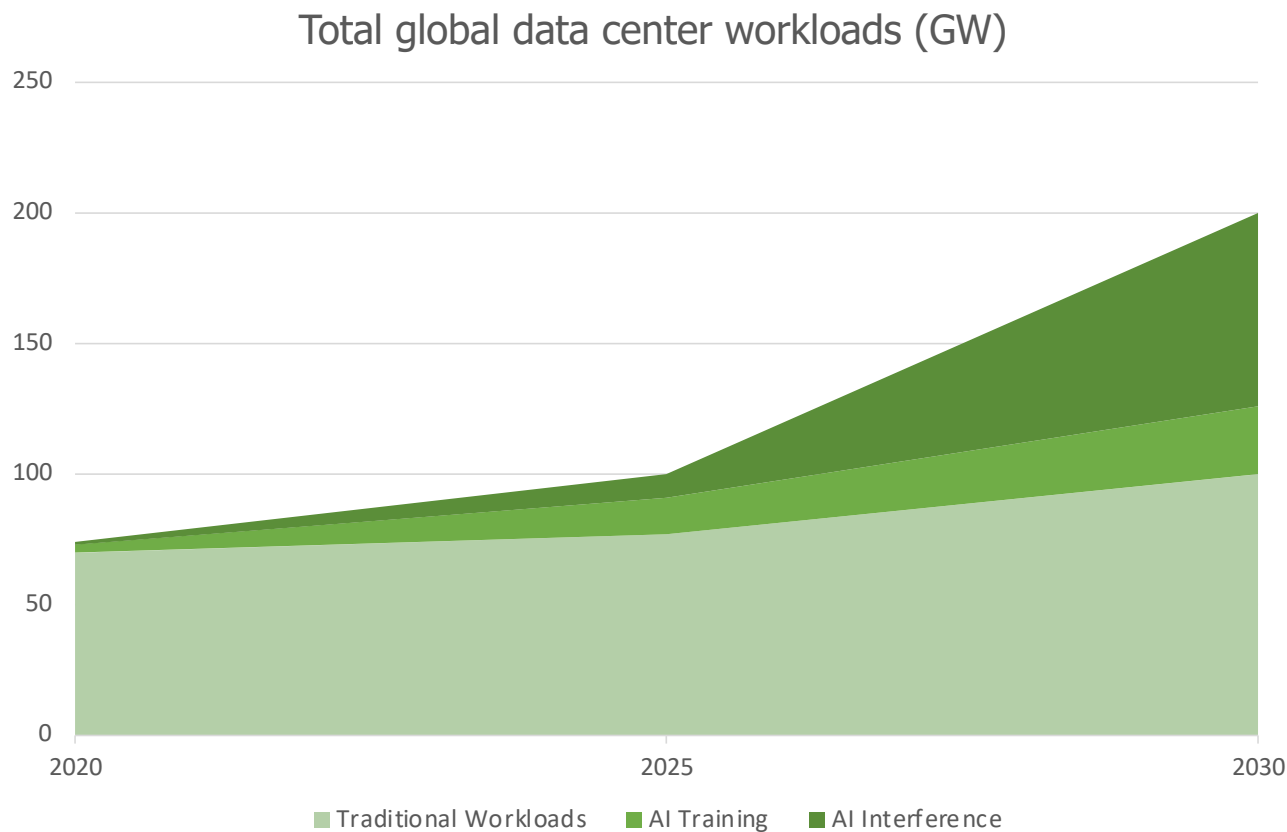
¹Three scenarios showing the upper-, low-, and midrange estimates of demand, based on analysis of AI adoption trends; growth in shipments of different types of chips (application-specific integrated circuits, graphics processing units, etc) and associated power consumption; and the typical compute, storage, and network needs of AI workloads. Demand is measured by power consumption to reflect the number of servers a facility can house.
Source: McKinsey Data Center Demand model

McKinsey & Company

Source: https://www.linkedin.com/posts/anaestherfranco_datacenters-digitalinfrastructure-economicgrowth-activity-7370090249177309184-i5ng/?utm_source=share&utm_medium=member_ios&rcm=ACoAAAKLw2YBeQZzHwOYXpqBV-CfxaCsFwGY_c



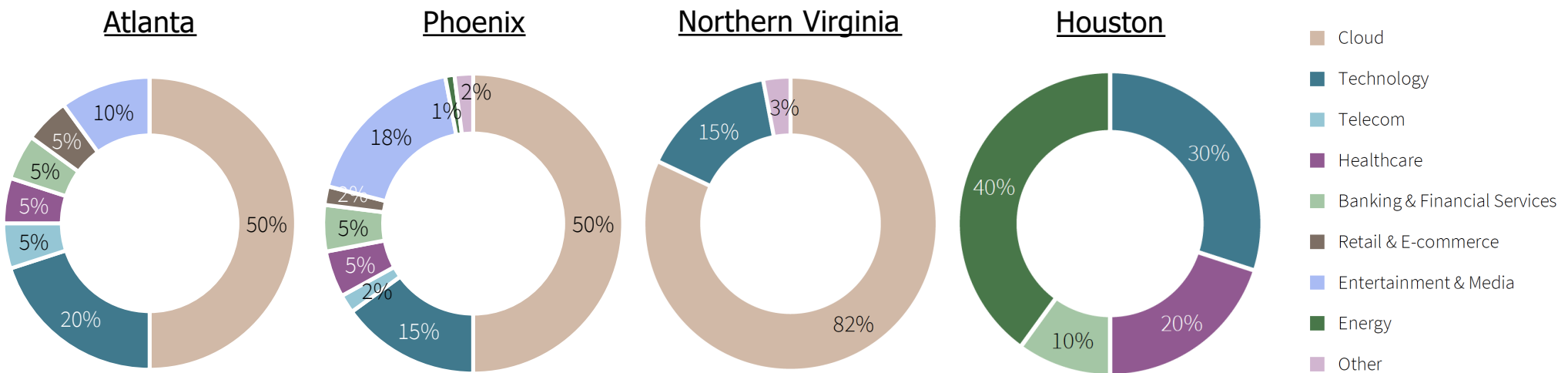
Global Data Center Market Outlook



[Source: JLL Research, 2025](#)

Data Center Trends

User Demand by Industry Varies Across Markets



Source: JLL, North America Data Center Report, H2 2023, <https://www.us.jll.com/content/dam/jll-com/documents/pdf/research/americas/us/jll-north-america-data-center-report-h2-2023.pdf>

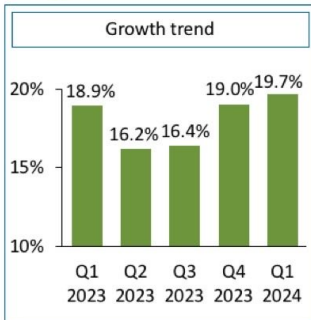


Data Center Trends

Cloud spend up US\$13 billion in Q1 2024



Worldwide cloud infrastructure services market summary
Q1 2024 US\$77.7 billion
Q1 2023 US\$64.9 billion ↑ 19.7%



Leading providers

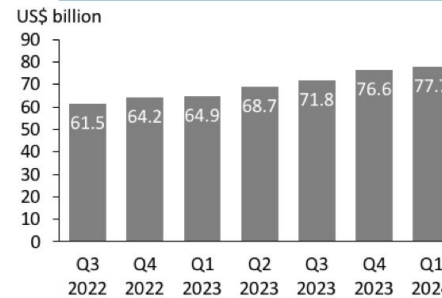
Rank	Q1 2024 share	Growth
#1	aws	17.1%
#2	Microsoft Azure	31.1%
#3	Google Cloud	27.5%

Source: Canals estimates, Cloud Channels Analysis, June 2024



Cloud spend to exceed US\$590 billion by 2028

Worldwide cloud infrastructure services Q3 2022 to Q1 2024
Q1 2023: US\$64.9 billion
Q1 2024: US\$77.7 billion
Growth: 19.7%



Source: Canals estimates and forecast, Cloud Channels Analysis, June 2024

Worldwide cloud infrastructure services forecast
2023: US\$282.0 billion
2028: US\$590.3 billion
CAGR: 15.9%

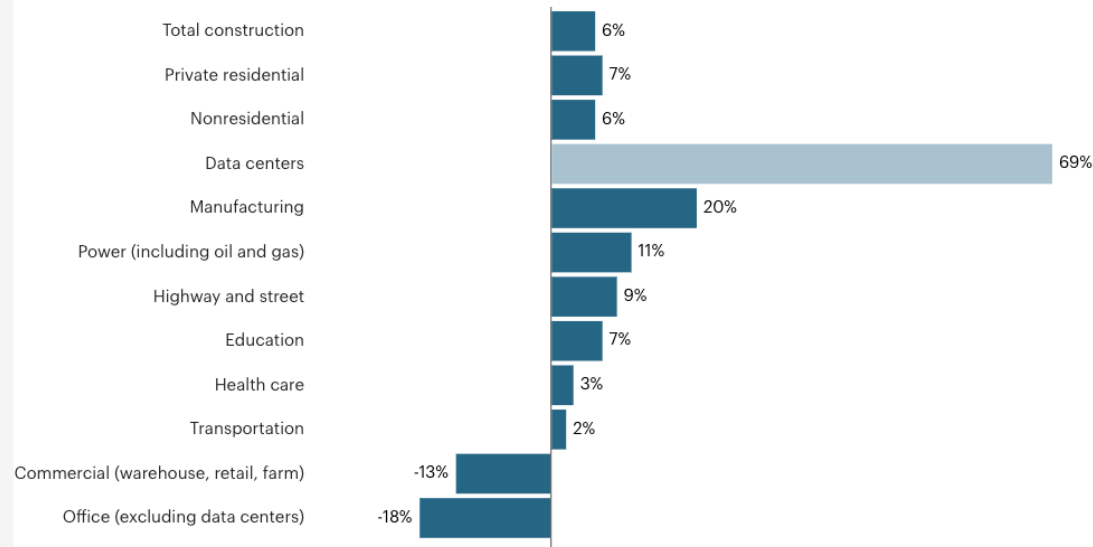


Source: https://www.linkedin.com/posts/steven-kiernan_public-cloud-is-worth-hundreds-of-billions-activity-7214594601775435776-IzDG?utm_source=share&utm_medium=member_desktop

Data Center Trends

CHANGE IN U.S. CONSTRUCTION SPENDING, MAY 2023–MAY 2024

The year-over-year percentage change in U.S. construction spending in current dollars, seasonally adjusted.



Source: Associated General Contractors of America, July 2024 report

THE BUSINESS
JOURNALS

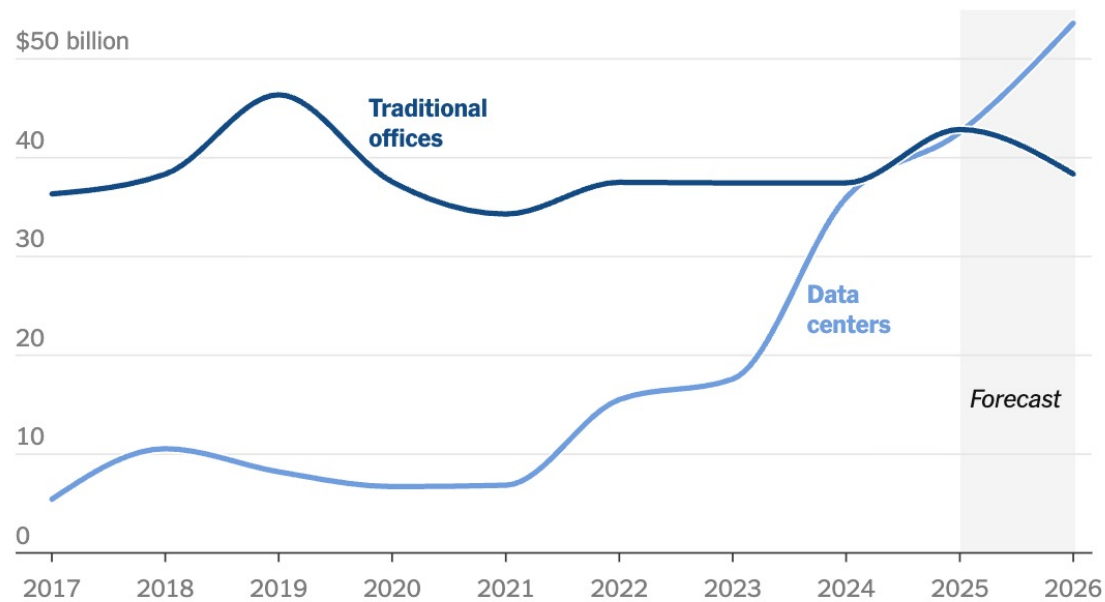


Source: Atlanta Business Chronicle, \$1B data centers adds to growing list of massive projects; offsets construction slowdown, Oct. 4, 2024, <https://www.bizjournals.com/atlanta/news/2024/10/04/1b-data-center-pitched-for-coweta-county.html>

Data Center Trends

A.I. Infrastructure Has Overtaken Office Construction

Spending on building data centers has ballooned in recent years – and that's not even counting the equipment that goes into them.



Note: Spending is recorded in the year the project starts construction. • Source: Dodge Construction Network • By The New York Times

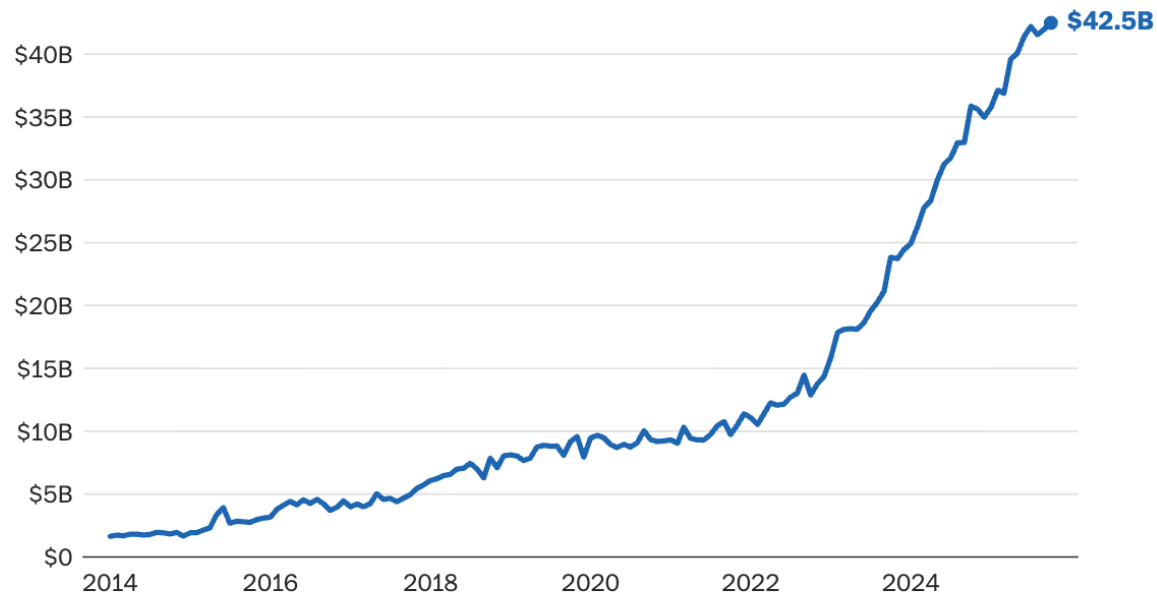
Source: The New York Times, The A.I. Spending Frenzy Is Propping Up the Real Economy, Too, August 27, 2025, <https://www.nytimes.com/2025/08/27/business/economy/ai-investment-economic-growth.html>



Data Center Trends

Spending on new data centers has roughly doubled since 2023

Monthly construction spending on data centers



Seasonally adjusted annual rate

Source: [Census Bureau](#)

Source: The Washington Post, The 'one-legged stools' holding up a fragile economy, February 11, 2026, <https://www.washingtonpost.com/business/2026/02/11/consumer-spending-us-economy/>



Why Data Centers?

- Generation of substantial tax revenue.
- Build and support larger ecosystems of suppliers, service providers, and other sectors of the economy.
 - **Each direct job in the data center industry supports more than six additional jobs**

Why Data Centers?

- Tremendous Capital Investment
- Big Driver of Tax Revenue
- High Wage Jobs, Low Demand on Services
- Substantial Construction Jobs and Activity
- Building and Strengthening Tech Ecosystem
- Catalyst for Renewable Energy

U.S. Data Center Industry

Jobs

- **5.5 million total jobs in 2024** (17% growth from 2023)
- **Nationally, each direct job in data center industry supports 4.5 additional jobs in the broader U.S. economy in 2024.**
- **\$525.3 billion in total labor income in 2024** (22% growth)

GDP

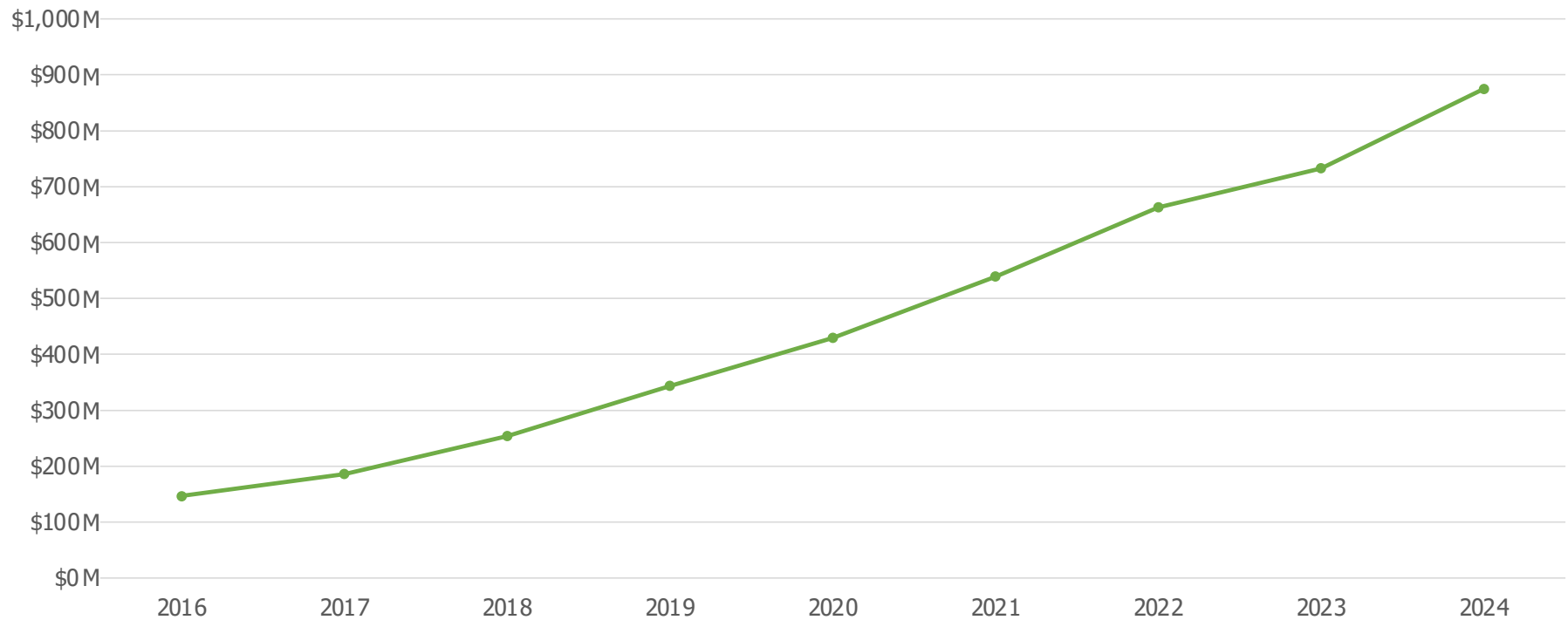
- **\$926.9 billion in GDP impact in 2024** (21% growth from 2023)

Taxes – Federal, State, and Local

- **\$204.4 billion in total impact in 2024** - 146% increase from 2017



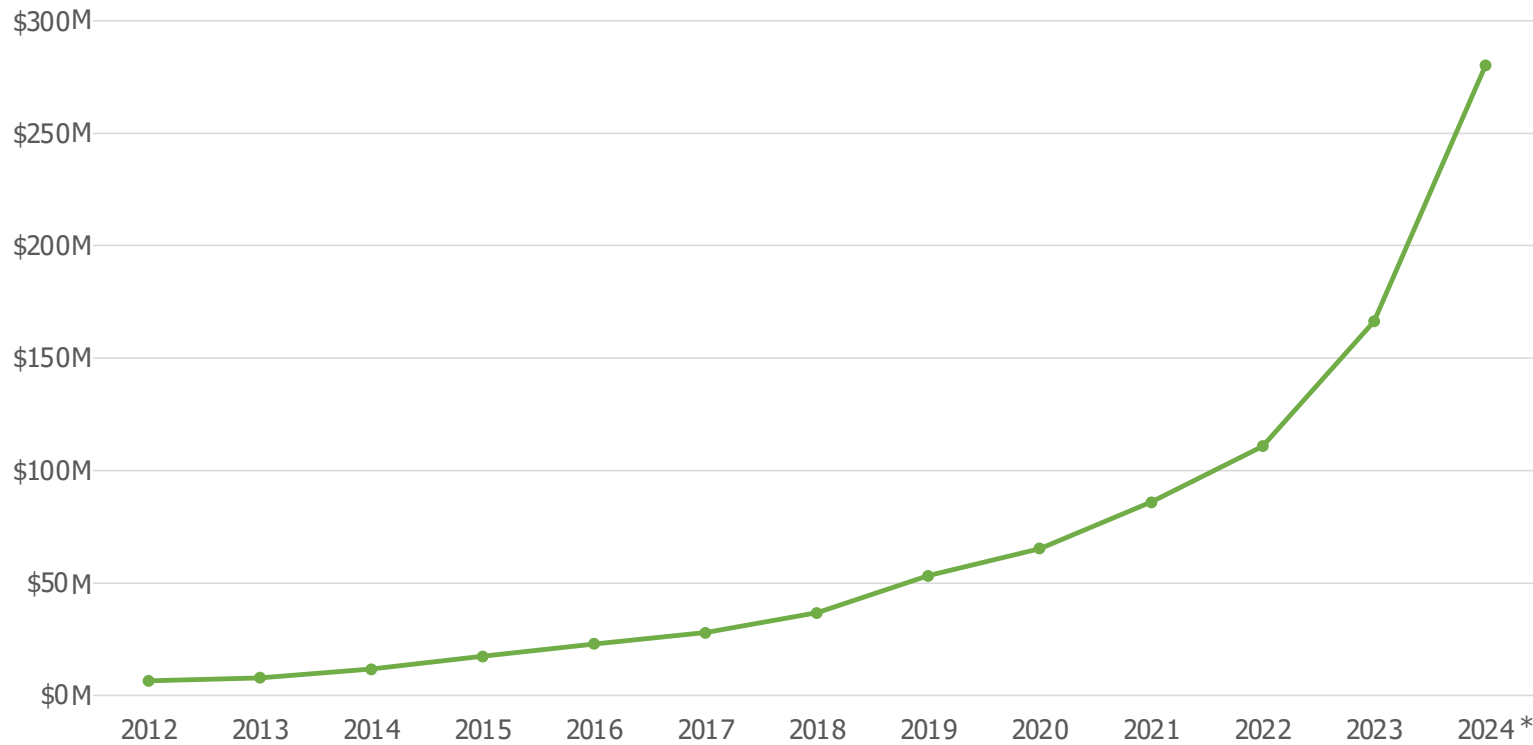
Loudoun County: Total Data Center Tax Revenue (\$Millions) per Tax Year



*Total Column may not foot due to rounding

Source: DC News Now, In Northern Virginia, growing data center revenue is volatile, tax records show, Aug. 17, 2023, <https://www.dcnewsnow.com/news/local-news/virginia/loudoun-county/in-northern-virginia-growing-data-center-revenue-is-volatile-tax-records-show/>

Prince William County: Total Data Center Tax Revenue (\$Millions) per Tax Year

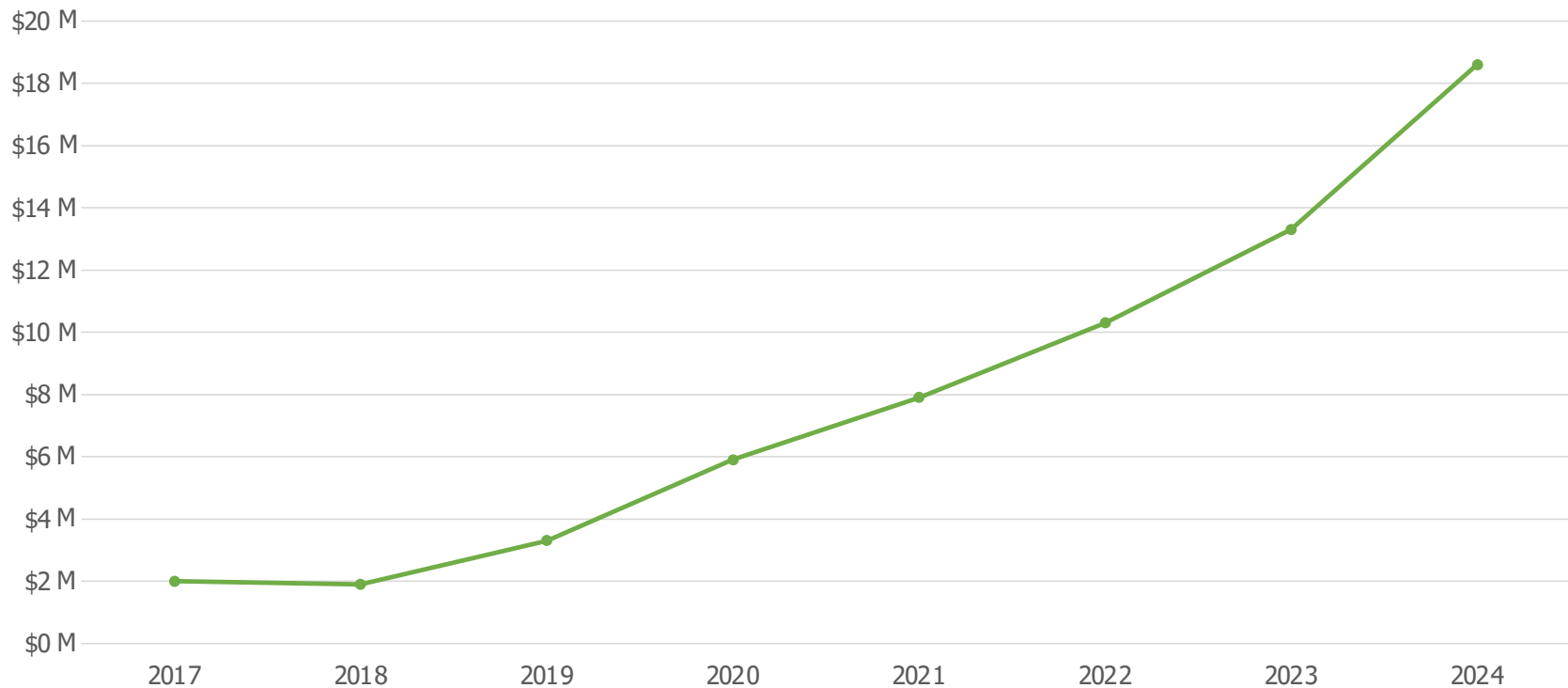


*TY 2024 Preliminary. Subject to change

Source: InsideNOVA, Prince William's data center tax revenue jumps nearly 70% to \$280 million, March 19, 2025, https://www.insidenova.com/headlines/prince-williams-data-center-tax-revenue-jumps-nearly-70-to-280-million/article_79f51357-4aed-485a-8335-0af055df666a.html



Henrico County: Total Data Center Tax Revenue (\$Millions) per Tax Year



*Total Column may not foot due to rounding



Source: Henrico EDA, May 9, 2024



Power Surge

How AI-driven demand for new data centers is placing new pressure on local infrastructure and public finance—and what local governments can do about it

BY JARRON BRADY

[Power Surge Article](#)

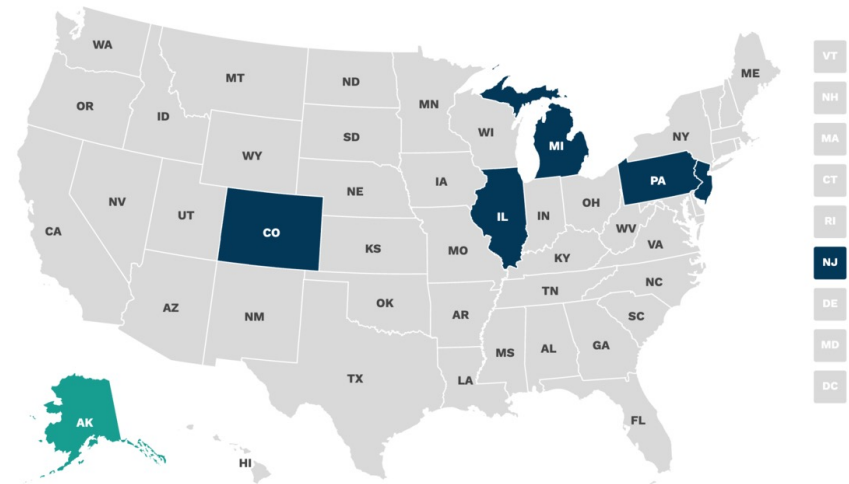
Is shared prosperity possible?



Community Benefit Agreements, Development Agreements and Other Local Considerations

Which states considered community benefit agreements in data center legislation in 2026?

■ Legislation introduced ■ Legislation passed chamber of introduction



Source: Community Benefit Agreements. Data as of July 1, 2026.

M