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FREE EXECUTIVE SUMMARY

POWERING AI

The U.S. Data Center Buildout Report · 2026

Inside: the 8 findings, the one chart that explains the AI power crunch, and a preview of the regional race.

Full 35-page report + dataset -> gridlas.com

EXECUTIVE SUMMARY

Electricity became AI's hardest constraint

U.S. data centers consumed 4.4% of the nation's electricity in 2023 — projected to reach 6.7% to 12% by 2028 (Lawrence Berkeley National Laboratory), more than doubling as AI scales. Compute is built in months; new power and transmission take four-plus years to clear interconnection. This report maps where that collision is happening — and who wins.

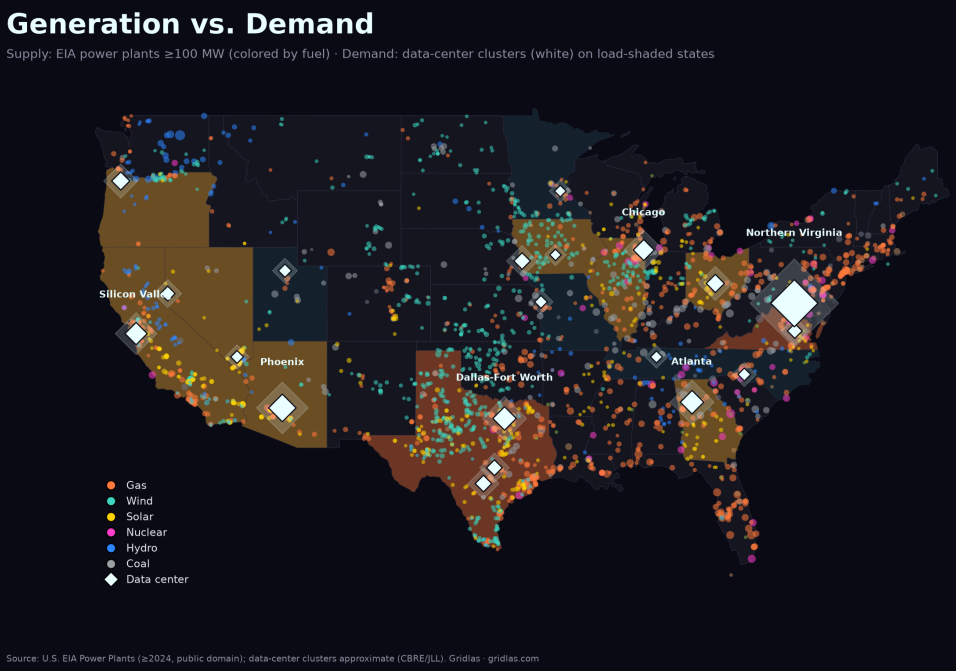
> **226 GW queued in Texas — 77% data centers.**

The 8 findings

1. **Demand is outrunning supply.**
   tripled in a decade; 23 GW added vs 226 GW queued in ERCOT.
2. **A handful of metros dominate.**
   NoVA ~4,040 MW; Dallas & Atlanta each >1 GW.
3. **Texas is the breakout market.**
   ERCOT's large-load queue jumped 63 -> 226 GW in a year.
4. **The queue is the real constraint.**
   typical wait is now ~4.5 years to operation.
5. **Gas and nuclear are back.**
   the data-center SMR pipeline grew 25 -> 45 GW in 2025.
6. **Behind-the-meter is surging.**
   stalled grids push developers to on-site gas.
7. **Transmission is the silent blocker.**
   408 GW has an agreement but isn't operational.
8. **The next wave is moving inland.**
   Ohio gigawatt sites; Atlanta 2,076 MW under construction.

THE CHART THAT EXPLAINS IT

AI is colliding with the grid



Supply is everywhere — but demand concentrates onto specific, already-stressed grids. The full report breaks down all five major markets, the interconnection queues, and a 12-month outlook.

Get the full report

35+ pages · regional deep-dives · interconnection analysis · companion dataset

Report $99 · + Dataset $179 · + Quarterly $349

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