

Data Center Energy Investment



Overview

The rapid expansion of AI and new data centers is driving up global power demand. The shift is a potential boon for nuclear, geothermal, fuel cells, battery storage, and other innovative technology solutions set to provide reliable, low-carbon energy. A new report from the IEA assesses how the relationship between energy and artificial intelligence (AI) is evolving rapidly, drawing on the latest data and analysis and close tracking of technological and economic developments in the AI sector. Financing solutions in the public and private. This article is a collaborative effort by Alastair Green, Humayun Tai, Jesse Noffsinger, and Pankaj Sachdeva, with Arjita Bhan and Raman Sharma, representing views from McKinsey's Electrical Power & Natural Gas; Technology, Media & Telecommunications; and Private Capital Practices. The power sector. Data center capital expenditure reached \$770 billion in 2025, surpassing investments for upstream oil and gas activities in the same year. This round-up brings you the key stories from the energy sector over recent weeks. Top energy news: US energy groups invest record amounts in power plants for data centres; Energy. If there's any question about whether data centers are driving the global economy, a new report from the International Energy Agency (IEA) should dispel any doubts.



Article Content

Hyperscale AI data centers: 10 Breakthrough

Hyperscale data centers are now powering AI models with a revolutionary architecture—at a staggering energy cost.

Covering electricity price increases from our data centers

As we continue to invest in American AI infrastructure, Anthropic will cover electricity price increases that consumers face from our data centers.

Meta extends datacenter energy investment boom with

Meta (Facebook) signed on to purchase the renewable energy certificates associated with two utility-scale solar projects in Louisiana. It has

Big Tech's A.I. Data Centers Are Driving Up Electricity

Electricity rates for individuals and small businesses could rise sharply as Amazon, Google, Microsoft and other technology companies build

ACS is joined by Global Infrastructure Partners to launch a global data ...

It also strengthens ACS Digital & Energy, ACS's investment arm focused on the development of data centers and its associated energy solutions. GIP is a leading infrastructure

Putting things in perspective: Data center investments now on par with ...

For energy market players, data centers are already reshaping markets and represent a generational shift in energy infrastructure investment. The fundamental asset class in data centers

BlackRock Says Buy AI Energy Stocks Over Big Tech

BlackRock Says Buy AI Energy Stocks Over Big Tech in 2026. Here Are 3 Top Picks. These companies offer immediate solutions to the data center

Europe power costs threaten AI data center investment competitiveness

Europe is trying to expand AI computing capacity and the data center infrastructure needed to compete with the U.S. and China. But sharply higher electricity prices across the region are making energy

6 Best Energy Stocks for the AI Power Grid Buildout

Why Invest in AI Grid Infrastructure Through Energy Stocks? The computing power required for artificial intelligence is much higher than for

Data centre electricity use surged in 2025, even with tightening ...

However, data centres can create special challenges for electricity affordability, since they have large, concentrated power loads and scale up rapidly, often triggering the need for new

Accelerating Power Demand from Data Centers Is

The rapid expansion of AI and new data centers is driving up global power demand. The shift is a potential boon for nuclear, geothermal, fuel cells,

Data centers now attract more investment than finding

This year, the world will spend \$580 billion on data centers, \$40 billion more than it will spend on new oil supplies. "This point of comparison

AWS cleared to proceed with Santiago data centre in Chile

AWS will move forward with a planned data centre complex near Santiago after Chilean environmental authorities rejected objections from residents over the project's approval process.

2025 Global Data Center Investor Intentions Survey

Investor demand for data centers is surging, fueled by AI growth, rising capital allocations, and a shift toward high-risk, hyperscale strategies.

US data centers' energy use amid the artificial

With the rapid development of data centers in the United States, Pew Research Center conducted this study to learn more about energy use at

Global data centre capacity set to nearly double by

The report points to a \$3tn investment "supercycle" as AI reshapes infrastructure demand, energy strategies and capital markets worldwide. AI is

New Data Center Developments: March 2026

Review the latest data center news involving design, construction, power, and investment developments announced over the past month.

In focus: Data centres – an energy-hungry challenge

Data centres are a vital infrastructure supporting our ever-growing use of cloud storage, social media, AI, streaming services and more. They're

I Squared Capital Announces Expansion of its Data Center Franchise

I Squared Capital ("I Squared"), a leading independent global infrastructure investment manager, today announced that it has agreed to acquire Elea Data Cent...

25+ AI Data Center Statistics & Trends (2025 Updated)

60% of new data centers 2025 will be built in the U.S. Secondary markets like Columbus, Ohio, are attracting \$2.3 billion in data center

BloombergNEF Finds Global Energy Transition

BloombergNEF's Energy Transition Investment Trends reviews annual investment figures in the global energy transition, including spending to

AI Market Trends 2026: Global Investment, Risks, and

Discover key market trends as AI becomes the central force influencing growth, earnings, geopolitics, and investment strategy across global

US energy firms spend big on data centre power – and

US energy companies are investing record amounts in building power plants to meet electricity demand from data centres. This round-up brings you

Bloom Energy

\$5 billion partnership launches first phase of joint AI infrastructure vision Bloom Energy to become preferred onsite power provider for Brookfield's global AI factories The partnership marks

KKR and Energy Capital Partners Announce \$50 Billion Strategic ...

NEW YORK & SUMMIT, N.J. – (BUSINESS WIRE)– KKR, a leading global investment firm, and Energy Capital Partners (“ECP”), the largest private owner of power generation and renewables in the U.S.,

Data center energy spend rivals global solar investment

Countries with strong energy resources and stable regulatory frameworks, including Finland, Portugal, and Thailand, are emerging as potential hubs for future data center investment

OpenAI, Oracle, and SoftBank expand Stargate with

OpenAI, Oracle, and SoftBank are announcing five new U.S. AI data center sites under Stargate, OpenAI's overarching AI infrastructure platform.

Data centers and AI: How the energy sector can meet power demand

This article addresses this rapidly evolving space: the prospective growth of AI and demand for data centers, the challenges to scaling data centers, and how investors and incumbents

Inside the power deal behind Meta's El Paso data center now at \$10 ...

The data center's cost will grow from \$1.5 billion to \$10 billion as El Paso Electric works to rapidly build a power plant to service it. Opponents are concerned about its water usage, air

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