

THE U.S. GREEN DATA CENTER MARKET TO CREATE \$24 BILLION OPPORTUNITIES IN 2028 – ARIZTON

Renewable energy companies such as Dominion Energy, Avangrid, EDF Renewables, ENEL are setting up new plants exclusively for data center companies.



Arizton Advisory & Intelligence

CHICAGO, ILLINOIS, UNITED STATES,
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According to Arizton's latest research
report, the [U.S. green data center](#)

[market](#) to grow at a CAGR of 9.82% during 2022-2028. Hyperscale companies such as Facebook (Meta), Google, AWS, Microsoft, and colocation companies such as Equinix, Digital Realty, Compass Datacenters, and DataBank are working to make their data centers sustainable. There

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Robert, Lead Analyst

is rising pressure on governments from environmentalists and the public to approach green sustainability. The advantages of green data centers are decreasing space requirements, lowering carbon emissions, lowering long-term operating costs, and reducing water use and waste output. Companies are increasingly signing PPA with renewable energy providers. Moreover, investments are being made in technology to track carbon emissions, improve efficiency, and improve the water use of facilities.

Companies such as nZero and Foster Fuel are also making advances in offering innovation in the fuels, and carbon tracking helps data center providers move toward sustainability.

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KEY HIGHLIGHTS

- Hyperscale players such as Amazon Web Services (AWS), Google, Facebook (Meta), Microsoft, and Apple are procuring renewable energy for their facilities.
- AWS meets 85% of its energy requirements from renewable energy.
- Google, Facebook (Meta), and Apple meet 100% of their energy requirements for data centers

from renewable energy.

- Microsoft aims to power all facilities with 100% renewable energy by 2025.
- Colocation operators in the U.S. green data center market, such as Equinix, Digital Realty, CyrusOne, Vantage Data Centers, STACK Infrastructure, Iron Mountain, QTS Realty Trust, Aligned, and others, are proactively signing PPAs and procuring renewable energy to power their facilities to meet their sustainability goals.
- Digital Realty meets 100% of its energy requirements for data centers from renewable energy.
- QTS Realty Trust meets 35% of its energy requirements from renewable energy with a target of 100% renewable energy by 2025.
- The use of free cooling chillers will increase to reduce power consumption and carbon emissions by facilities. Also, the shift will increase towards liquid cooling leading to more sustainable data centers and bringing down PUE to a range of 1.1 to 1.4.
- Air cooling and liquid immersion cooling will also be used in most facilities to reduce their impact on the environment and reduce the PUE of data centers.
- Data center firms have also started investing in renewable energy farms by acquiring or developing their own.
- A few examples of the signing of PPAs or constructing renewable energy farms are -
- Amazon signed a PPA with AES Corp. for 450MW solar power. Amazon will use it for California operations, including its data centers. In addition, Amazon is planning the construction of two solar farms in Louisiana in the U.S.
- Google signed 942 MW PPA on solar power projects under development in Texas.
- Microsoft has signed a 110 MW Power Purchase Agreement with AES to secure renewable energy for its Californian facilities.
- CyrusOne collaborated with Gexa Energy, a NextEra Energy subsidiary, to procure solar (30 MW) and wind (10 MW) energy for its North Texas facilities.
- STACK Infrastructure plans to build a new 216 MW data center campus in Ashburn, Virginia, powered with 100% renewable energy supplied by Dominion Energy
- Going back to 2015, the U.S. government had mandated all federal government data centers to install DCIM software and achieve a PUE of 1.5 or lower.
- The U.S. department of energy announced a USD 42 million fund under Advanced Research Projects Agency-Energy (ARPA-E) project to fund suitable companies working in "high-performance energy efficient cooling solutions for data centers."
- Oregon has announced its data center policy recently, citing that other states also may consider formulating such policy to reduce the environmental impact of facilities.



- The Florida Government has announced plans to eliminate its carbon emissions by 2045.
- The Georgia Government is setting goals for a 50 percent decrease in greenhouse gas by 2030.

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GEOGRAPHICAL ANALYSIS

- Site-Selection for facilities across the U.S. will depend mostly on access to renewable energy.
- South-Eastern U.S. market will remain a hotspot of data center development in the upcoming years, with more companies flocking to the region.
- Due to the lack of land and renewable energy availability in the North-East U.S., it will be the least preferred region for companies to set up the data center.
- The U.S. green data center market will witness increased interest from real estate and private equity firms entering the market, either by establishing a data center business unit or through joint ventures with operators to invest in hyperscale projects.

VENDOR LANDSCAPE

- Increased adoption of AI and software for carbon emission tracking, temperature monitoring, etc., is bringing AI and programming-based companies into focus for data center companies like nZero, and CarbonCure, which are developing and supporting facilities in sustainability.
- Renewable energy companies like Dominion Energy, Avangrid, EDF Renewables, ENEL Group, and many more are supplying renewable energy to data center operators. These companies are setting up new plants exclusively for data center companies, thus providing clean power sources for data center companies.
- Colocation vendors in the U.S. green data center market, such as Equinix, Digital Realty, QTS Realty Trust, Vantage Data Centers, CyrusOne, Compass Datacenters, and hyperscale vendors, such as Microsoft, AWS, Google, Apple, Meta, and others, are adopting lithium-ion UPS systems, Microgrid systems, Smart-grid systems, and many newer support systems.
- Companies like Eaton, Vertiv, Schneider Electric, and many others are supplying Lithium-ion based UPS systems, smart-grid solutions, and new switchgears compatible with different sources of power supplies.
- Construction contractors are now focusing on the sustainable development of facilities, with construction and design being critical for facilities considerations to adhere to standards about uptime and efficiency.

CHECK OUT SOME OF THE TOP-SELLING RESEARCH REPORTS:

Latin America Green Data Center Market - Industry Outlook and Forecast 2022-2027

Green Data Center Market - Global Outlook & Forecast 2022-2027

U.S. Data Center Construction Market - Industry Outlook & Forecast 2023-2028

U.S. Data Center Market - Industry Outlook & Forecast 2022-2027

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