MOCA SYSTEMS, INC.

Sizing the Surge: U.S. Data Center Construction Outlook to 2030

A Converged Market View

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Executive Overview

The U.S. data center market has shifted from steady expansion to a full-scale infrastructure surge. Driven by AI workloads, hyperscale cloud growth, and a race to secure power and real estate, it now represents the fastest-growing segment of nonresidential construction.

Yet, beneath the headlines lies a deeper question: **What is the real size of the U.S. data center construction surge, and how will it shape the markets that design and build these massive facilities?**

This whitepaper merges more than a dozen analyst forecasts with committed capital projects, utility filings, and pipeline data to provide the most comprehensive snapshot of the U.S. data center construction market through 2030. While long-range models suggest 15% to 30% compound annual growth rates (CAGR), with AI-specific forecasts climbing as high as 65%, near-term evidence from capital commitments point to even more aggressive front-loaded growth. MSI Economics presents a balance between committed capital and existing risk. In 2022, with the onset of commercialized AI, U.S. data center spending was $11 billion, a mere $2 billion more than 2021. In 2026 our outlook jumps to $86 billion; an increase of 782% from the 2022 baseline.

MSI Economics frames this outlook across five dimensions:

01 **Forecast Landscape** – Comparing analyst projections with project-level capital deployment.

02 **Market Drivers & Timing** – Linking data center applications to the pace of construction demand.

03 **Constraints and Risks** – Power, labor, permitting, and equipment as potential brakes on growth.

04 **Construction End Market Dynamics** – Implications for engineering, architecture, contracting, and construction technology.

05 **MSI Economics Data Center Construction Forecast** – A transparent view of the assumptions and methodology behind our market sizing.

MSI

Forecast Landscape

Analyst Growth Forecasts

Public analyst forecasts for the U.S. data center market vary significantly, reflecting differences in methodology, assumptions, and time frames. Below is a selection of analyst perspectives used in compiling this analysis:

- **Jones Lang LaSalle (JLL)** projects a steady 15% CAGR through 2030, emphasizing long-term infrastructure demand rather than short-term shocks.[1]
- **McKinsey & Company** anticipates data center growth will exhibit a 22% CAGR from 2023 to 2030, with a 39% CAGR tied specifically to AI workloads.[2]
- **Boston Consulting Group (BCG)** forecasts that global data center power demand will grow at 16% CAGR from 2023 to 2028, with GenAI training workloads increasing 30% CAGR and inference workloads exploding at 122% CAGR. Though BCG forecasts GenAI will represent just 35% of total power demand by 2028.[3,4,5]
- **Grand View Research** expects U.S. data center market growth to hover around 10.7% CAGR from 2023 to 2030, buoyed by hyperscale and colocation demand.[6]

However, these headline CAGR forecasts often smooth over the near-term surge driven by AI workloads and actual capital deployment. For this context, we need to look at the capital deployment pipeline.

Capital Deployment Forecasts

Capital deployment represents committed funds in the construction pipeline—whether projects are underway or still in planning. It reflects the market at a given moment but remains subject to change with forces such as interest rates and shifting return profiles. When data from GlobalData, Dodge, and MSI's proprietary research are overlaid, 2025–2026 emerges as the clear inflection point, with capacity and spending far exceeding traditional models.

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[1] JLL | 2025 Global Data Center Outlook

[2] McKinsey & Company | AI power: Expanding data center capacity to meet growing demand

[3] BCG | Breaking Barriers to Data Center Growth

[4] BCG Henderson Institute | Generative AI's Impact on Computing Power

[5] IoT Analytics | The leading generative AI companies

[6] Grand View Research | U.S. Data Center Market Size, Share & Growth Report, 2030

- **GlobalData** estimates the global pipeline of data center projects is valued at over $1.43 trillion, signaling enormous near-term capital deployment. As of Q1 2025, project-level commitments for the U.S. total $50 billion in 2025, $100 billion in 2026, and $102 billion in 2027 with planned projects falling off in the 2028-2030 time frame. Though there may be room for additional growth past 2028, only committed spend is tracked in Figure 1.[7]

Global-Data Center Construction Planned Pipeline ($USD, Billions)

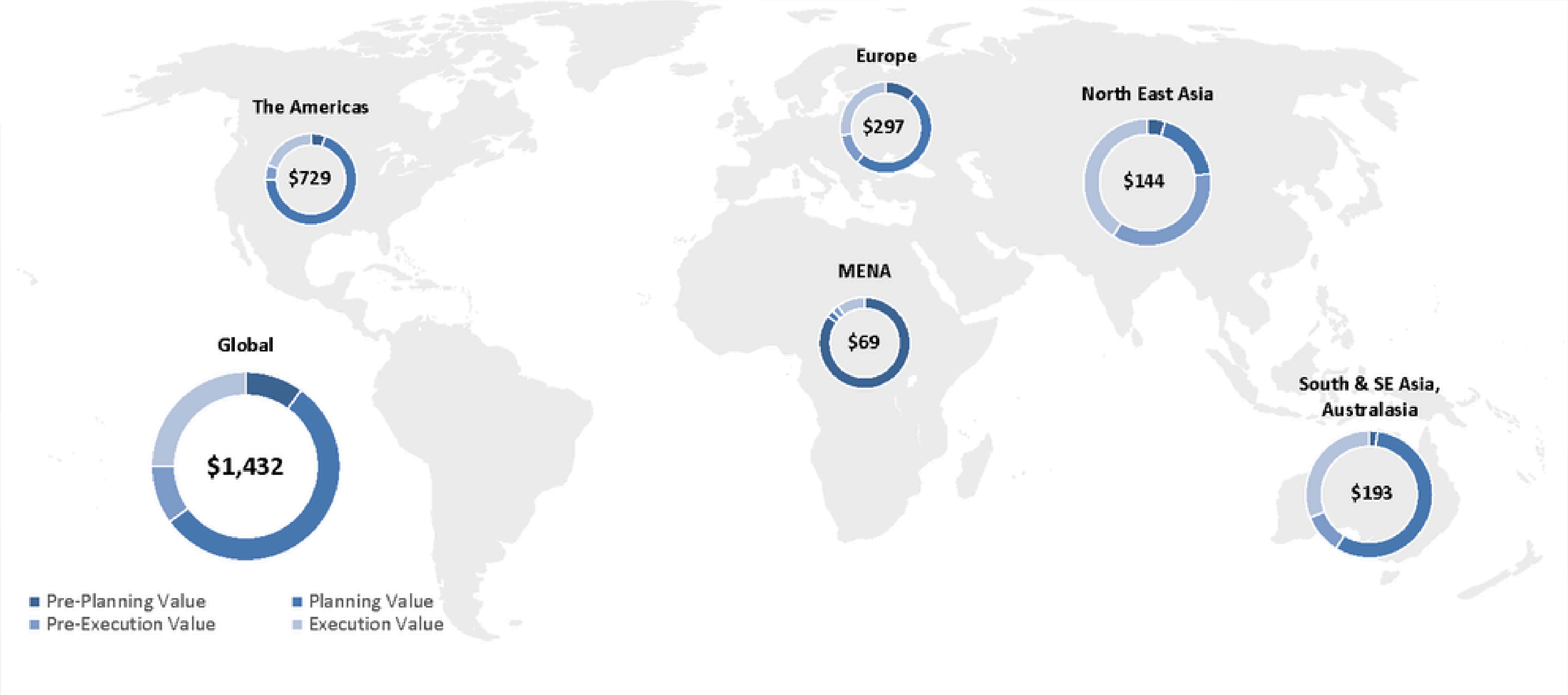


Figure 1 GlobalData 2025 GlobalData Center Outlook
Source(s): GlobalData

- **Dodge Data and Analytics** which tracks starts and permitting showed a significant increase in data center projects in Figure 2 supplanting the wider commercial real estate construction slump (the category in which data centers are traditionally counted). As of July 2025, Dodge has counted almost $1 trillion in pre-design or design within the pipeline.[8]

[7] GlobalData | Global Data Center Construction Projects (Q2 2025)
[8] Dodge Construction Network | The Expansion Explosion

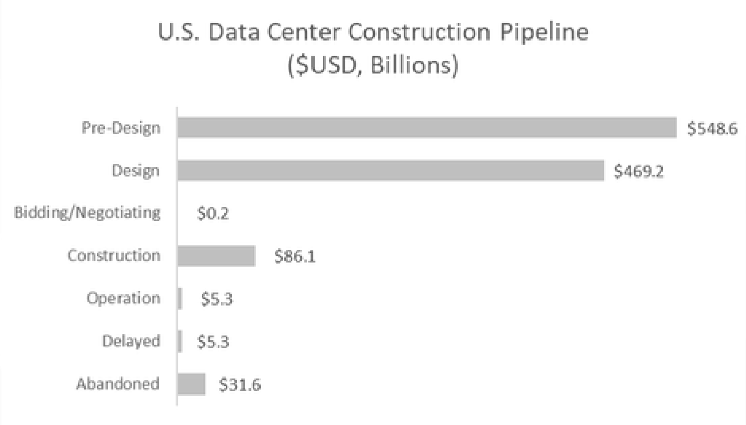


Figure 2 Dodge Data & Analytics U.S. Data Center Construction Pipeline (Q2 2025)
Source(s): Dodge Data & Analytics

- **MSI Economics** estimates a similar aggressive expansion to committed spend from both GlobalData and Dodge as shown in Figure 3. Though there are expansive opportunities within the pipeline, we estimate a moderating spend as both supply constraints and risk for overbuild begin to outstrip capital utility and push some projects into 2030. Still the expectation for growth remains at $86 billion in 2026 for the U.S. market.

Data Center Construction Growth Scenarios: Committed Spend & Analyst Expectation Distribution

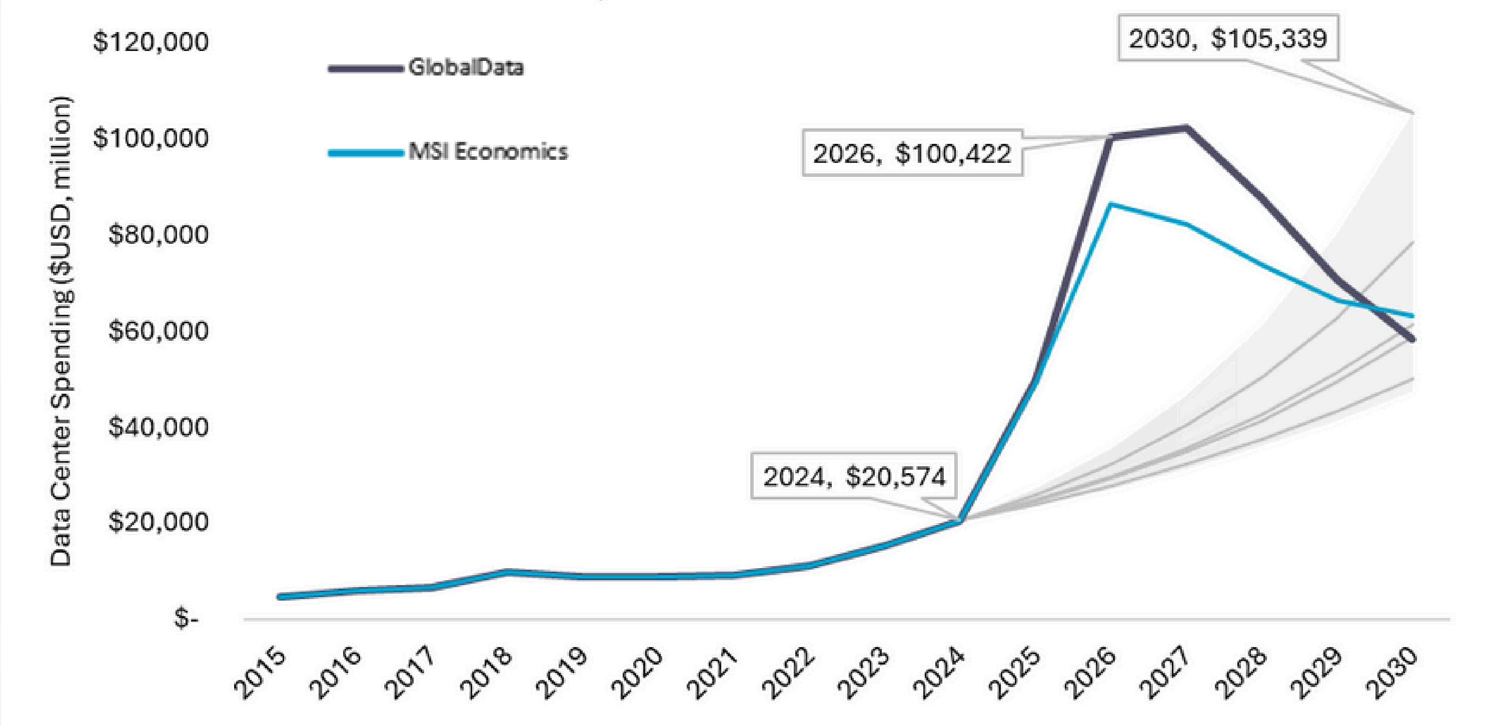


Figure 3 U.S. Data Center Construction Spending Outlook
Source(s): MSI Economics, JLL, GlobalData, Boston Consulting Group (BCG), Grandview Research, Lawrence Berkeley National Laboratory (LBNL), McKinsey & Company

Planned spending signals point to a market trajectory where short-term acceleration outpaces smoothed long-term models, making reliance on CAGR alone a strategic risk for firms planning capital, staffing, and infrastructure commitments.

Market Drivers & Timing

AI Workload Driving Surge

- **Training surge (2024–2026)**: Hyperscalers are front-loading campus builds to host GPU clusters, driving step-changes in power density and cooling requirements. McKinsey estimates AI-ready data center capacity demand rising ~33% annually through 2030, with ~70% of incremental demand tied to AI workloads, underscoring why training capacity is the near-term focus.[9]
- **Shift to inference (2027+)**: BCG finds that while GenAI power demand grows quickly, by 2028 GenAI may still represent ~35% of total data center power demand, with inference workloads growing >100% CAGR from a small base; implying broader, more distributed capacity needs as inference scales into products and edge experiences.[10]
- **Global electricity pull**: IEA (International Energy Agency) projects data-center electricity use to more than double by 2030 to ~945 TWh in its analysis, with AI the most significant incremental driver.[11]

Power Density and Cooling Dictating Design

- **Racks are getting very dense**: Uptime 's 2024 research highlights a clear densification trend and the growing role of direct liquid cooling to support AI workloads.[12]
- **100 kW+ racks are no longer rare in AI deployments**: Industry operators and vendors report that AI racks commonly run above 100 kW, which is well beyond legacy air-cooling envelopes which is accelerating adoption of liquid and hybrid cooling topologies.[13]
- **Architectural implications**: Higher rack densities and cooling loops require structural allowances, specialized equipment rooms, and reallocation of space away from traditional IT hall footprints.[14]

[9] McKinsey & Company | AI power: Expanding data center capacity to meet growing demand

Grid is the Bottleneck

- **Interconnection queues are long**: Berkeley Lab's 2024 "Queued Up" analysis shows U.S. transmission interconnection timelines have stretched materially, with gigawatt-scale projects competing for scarce capacity, a key context for why siting is concentrating in a few power-advantaged metros and at repowered industrial sites.[15]
- **Completion rates can be low**: In regional transmission organization markets like PJM, fewer than 25% of queued projects historically reach commercial operation, heightening execution risk for power-constrained builds.[16, 17]
- **Geographic concentration**: As a result, many builds are clustering in metros with available capacity or at repurposed industrial sites with existing interconnections.[18]

Peak Followed by Moderation

- **Near-term peak**: The confluence of AI training demand, long-lead equipment arriving, and secured power positions will produce the steepest capacity additions in 2025-2026.[19]
- **Moderation phase**: From 2027 onward, the mix will shift toward inference-led, distributed builds with lower density per rack but higher aggregate footprint.[20]

[10] BCG | Breaking Barriers to Data Center Growth
[11] IEA | AI is set to drive surging electricity demand
[12] Uptime Institute | Global Data Center Survey 2024
[13] Vertiv | Dynamic Cooling Solutions
[14] McKinsey & Company | Data Centers: The race to power AI
[15] Berkeley Lab | Energy Markets & Policy
[16] Monitoring Analytics | State of the Market Report for PJM
[17] Interconnection.fyi | PJM Active Interconnections (Tool)
[18] NREL | Data Center Infrastructure in the United States, 2025 (Map)
[19] McKinsey & Company | The cost of compute
[20] BCG | Breaking Barriers to Data Center Growth

Constraints and Risks

Significant constraints and risks in project delivery have emerged that could materially influence the trajectory of the U.S. data center construction pipeline. These challenges, if not addressed, have the potential to slow growth, disrupt schedules, and reshape how projects are planned and executed across the sector.

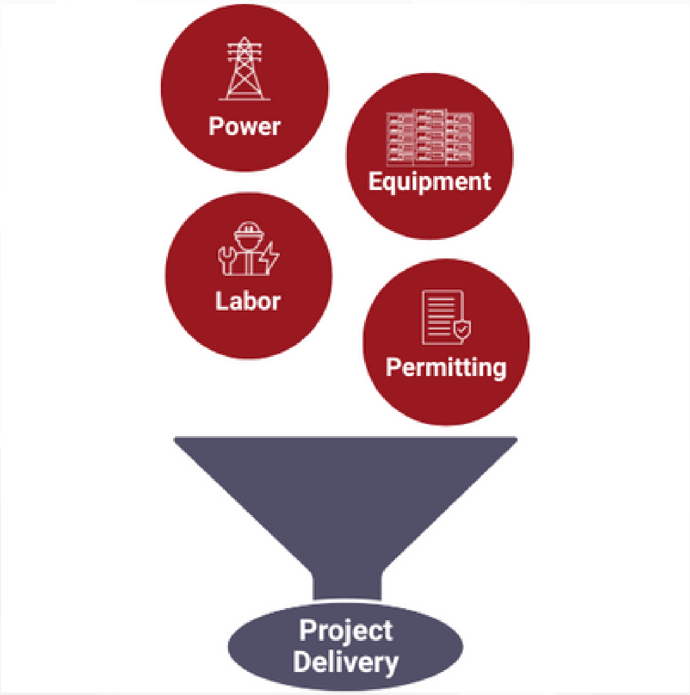


Figure 4 Constraints and Risks to Data Center Delivery

Power Availability and Interconnection

- **Grid as the ultimate gatekeeper**: Berkeley Lab's *Queued Up* 2024 report shows U.S. interconnection queues holding just under 2,300 GW of generation and storage requests in 2024—up more than 700% since 2014—creating long waits for large load projects like hyperscale campuses.[21]
- **Timelines are stretching**: The same Berkeley study finds average interconnection times now exceed 5 years, a material jump from ~3 years a decade ago, making early queue entry essential.
- **Not all projects get built**: Historical completion rates in major ISOs like PJM show that less than 12% of queued projects have reached operation since 1998.[22]

[21] Berkeley Lab | Generation, Storage, and Hybrid Capacity in Interconnection Queues

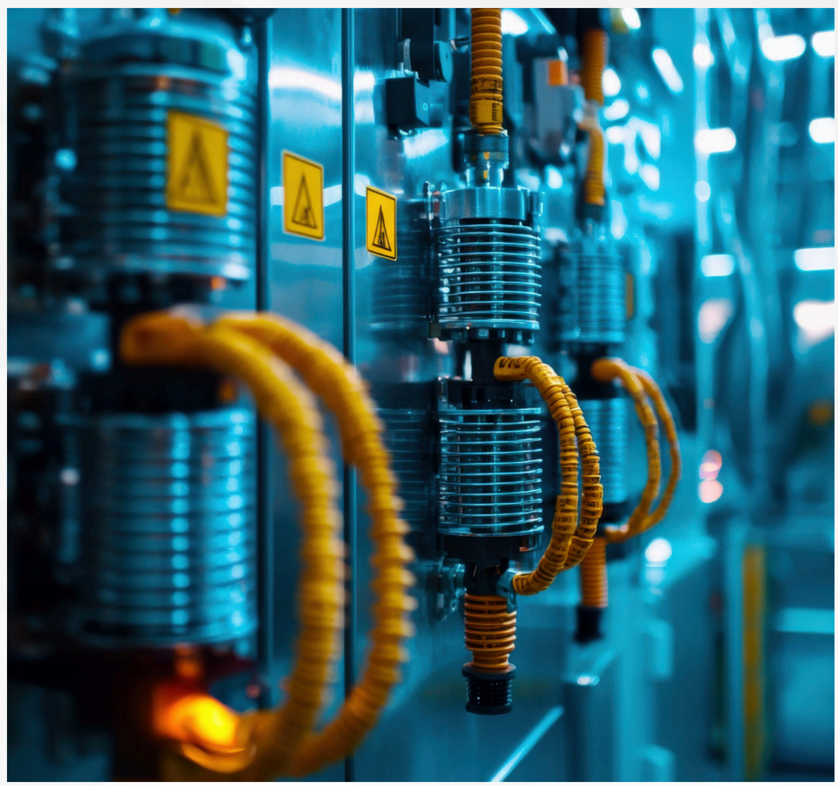
[22] Monitoring Analytics | State of the Market Report for PJM

Labor Shortages

- **Workforce gap remains severe**: The Associated Builders and Contractors (ABC) 2024 forecast projects the industry needs ~501,000 additional workers in 2024 on top of normal hiring to meet demand.[23]
- **Skilled trades in highest demand**: Electricians, high-voltage linemen, and HVAC specialists are the most constrained—roles critical for high-density MEP installs.[24]

Long-Lead Equipment

- **Transformers**: DOE notes large power transformer (LPT) procurement can run 80–210 weeks depending on unit size and origin.[25]
- **Switchgear and Generators**: Turner & Townsend's 2024 index shows lead times for MV switchgear at 60–100 weeks in constrained markets, often matching or exceeding structural steel packages.[26]



[23] ABC | Construction Quit Rate Plummets to 9-Year Low

[24] BLS | Occupational Outlook Handbook (Construction and Extraction Occupations)

[25] US DOE | Large Power Transformer Resilience

[26] Turner & Townsend | DCCI 2024 Data Centre Cost Index

Permitting and Regulatory Complexity

- **Local permitting delays**: Large data centers trigger complex permitting across building, environmental, and utility agencies; site approvals can stretch 6-18 months or longer even in established markets.[27] Though relief could be on the way; a recent executive order from the White House outlines steps to expedite the permit process.[28]
- **Water usage scrutiny**: Markets with stressed water resources are beginning to add cooling-water impact reviews, which can materially affect liquid-cooled designs.[29]

Implication for Stakeholders

The defining risks of the 2024–2026 boom are external constraints, not lack of demand. Firms that integrate power queue positions, labor partnerships, and early equipment buys into project origination will gain a decisive advantage over those that treat these as downstream execution items.

[27] Bohler | Navigating the Data Center Design and Approval Process

[28] President Donald J. Trump | Executive Order 14318: Accelerating Federal Permitting of Data Center Infrastructure

[29] Data Center Dynamics | AI Data Center Growth Deepens Water Security

Construction End-Market Dynamics

Following an understanding of the current market, constraints, and risks it's possible to take a look at impacts to the construction end-markets responsible for designing and building out the data center surge: engineering, architecture, contracting, and the construction tech stack.

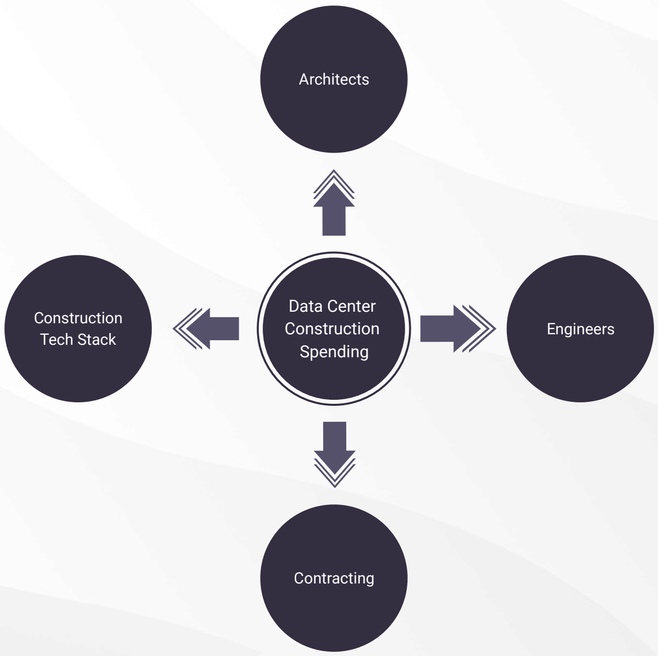


Figure 5 Data Center Construction End Markets

Engineering

What shifts:

- **Power-first engineering**: AI training clusters are pushing campuses toward much higher single-site loads; designs increasingly center on electrical distribution, redundancy, and substation integration. McKinsey highlights the step-change in campus power demand (hundreds of MW per site) as AI scales.[30]
- **Liquid-ready cooling topologies**: Traditional air-only envelopes struggle above ~30 kW/rack; direct liquid cooling (DLC) and hybrid solutions are moving from pilots to programs. Uptime's 2024 cooling survey shows DLC adoption rising—often still a minority of racks today but clearly scaling.[31]
- **Cost and complexity uptick**: Turner & Townsend's 2024 Data Centre Cost Index reports 9% YoY average cost increase across global markets, with MEP systems as core drivers, raising design stakes for value engineering and phasing.[32]

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[30] McKinsey & Company | Data Centers: The race to power AI

[31] Uptime Intelligence | Uptime Institute Cooling Systems Survey 2024

[32] Turner & Townsend | DCCI 2024 Data Centre Cost Index

- **Transformer and switchgear scarcity**: Lead-time elongation and standards changes (e.g., DOE efficiency rules for distribution transformers) ripple through project critical paths; suppliers with allocation or domestic capacity become strategic partners.[33, 34]
- **Implications**: early power studies, DLC integration pathways, and site-specific grid strategies (including on-site/adjacent generation) become critical engineering scope.[35]

Architecture

What shifts:

- **Standardization and speed**: Hyperscale templates compress schematic/design development; the architectural delta skews to site constraints, permitting, and constructability rather than bespoke floor plans. Industry guidance emphasizes "design once, deploy many," to meet AI timelines.[36]
- **Envelope for density**: Even with standardized shells, architectural coordination around equipment yards, cooling distribution, and liquid-ready rooms becomes more involved as densities increase. Uptime's 2024 survey notes rising densification trends driving facility changes.[37]

Implications: faster iterations, template governance, and tight coordination with MEP on thermal paths and electrical clearances.[38]

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[33] NEMA | Response to DOE Final Distribution Transformer Efficiency Rule
[34] NIAC | Addressing the Critical Shortage of Power Transformers
[35] McKinsey & Company | Data Centers: The race to power AI
[36] McKinsey & Company | Scaling bigger, faster, cheaper data centers with smarter designs
[37] Uptime Institute | Global Data Center Survey 2024
[38] McKinsey & Company | Scaling bigger, faster, cheaper data centers with smarter designs

Contracting

What shifts:

- **Labor as a rate-limiter**: ABC estimates the U.S. construction industry needed ~501,000 additional workers in 2024 on top of normal hiring; pressure that continues into 2025, tightening schedules and bid cover.[39, 40]
- **Long-lead critical equipment**: Large power transformers face 80 to 210–week lead times in federal advisory reporting; sector analysis shows average procurement expanding from ~50 to ~120 weeks in recent years, with the largest units at the top end, forcing early procurement and phased energization plans.[41, 42]
- **MEP-heavy builds and prefabrication**: AI density drives more off-site fabrication (e.g., e-houses, skid-mounted cooling) to maintain velocity. Turner & Townsend's index and outlook sections underscore MEP complexity and cost drivers behind schedule risk.[43]

Implications: Lock long-lead gear early, expand prefab scope, sequence around interconnection and energization milestones, and increase workforce development/apprenticeship partnerships to sustain ramp.

[39] ABC | 2024 Construction Workforce Shortage Tops Half a Million

[40] ABC Rocky Mountain | Navigating the Construction Worker Shortage in 2025

[41] NIAC | Addressing the Critical Shortage of Power Transformers

[42] Utility Dive | Virtual Electric Transformer Reserve

[43] Turner & Townsend | DCCI 2024 Data Centre Cost Index

Construction Tech Stack

Building Information Modeling (BIM), Virtual Design and Construction (VDC), Data Center Infrastructure Management (DCIM), and Building Management System (BMS), Construction Project Management (CPM), and Lean project planning software.

What shifts:

- **Model-driven coordination**: More congested electrical/mechanical rooms and liquid loops increase BIM/VDC value for clash detection and just-in-time prefab.
- **Operational telemetry**: As densities rise, DCIM/BMS integration (thermal, electrical, and IT load telemetry) becomes central to commissioning and ongoing optimization.
- **Lean project planning**: As capital becomes increasingly at risk, the need to improve crew flow and plan on-the-fly adjustments to construction becomes increasingly important. CPM and Lean project planning software have shown the ability to mitigate these risks.[44]

Implications: Elevate tech stack and data standards early so solutions are "day-1 ready" to maximize technology effectiveness and utilization.

[44] Alexandria Engineering Journal | Applying Lean Thinking in Construction and Performance Improvement

MSI Economics Forecast Assumptions

To have a better understanding of the impact of a surge in data center construction as a foundation for forecast, MSI Economics incorporated developments and the impact of spending on Engineering, Architecture, Contracting, and Construction Tech Stack markets. Cumulative assumptions are highlighted in Table 1 and simplified further in Figure 6:

Table 1 Data Center Construction End Market Assumptions

	Definition	**2025-2030 Assumption**
Engineering	Encompasses the planning, analysis, and design of technical systems including structural, mechanical, electrical, civil, and environmental components. All work is intellectual and design-based and may require licensed Professional Engineers (PEs). No physical construction or field execution is included.	Engineering services will grow in strategic importance as rising cooling demands, energy efficiency requirements, and system complexity drive the need for advanced technical design and compliance expertise.
Architecture	Involves the conceptual and detailed design of the built environment, including spatial layout, interior planning, exterior aesthetics, and site integration such as landscaping. This work is entirely design-focused and does not include any physical construction activities.	Demand for architectural services will remain relevant in early-stage planning but is expected to decline over time as modular and standardized construction methods reduce the need for custom design.

	Definition	2025-2030 Assumption
Contracting	Includes all physical construction activities and site execution. This encompasses labor, materials, equipment, project management, site administration, bonding, and contingency. It is the only sub-sector responsible for the actual performance of work on site.	A temporary surge in project volume may create a competitive bidding environment, softening prices. However, persistent labor shortages and rising input costs will likely drive steady cost increases through 2030.
Construction Tech Stack	Refers to the suite of digital tools and software platforms used to support construction planning and management. This includes BIM (Building Information Modeling), scheduling software, field productivity tools, and analytics platforms. These technologies are used to manage and optimize construction but do not perform physical work themselves.	Adoption of construction software will increase in the near term as firms seek efficiency and oversight. Over time, market consolidation may reduce per-project spending, even as overall utilization remains high.

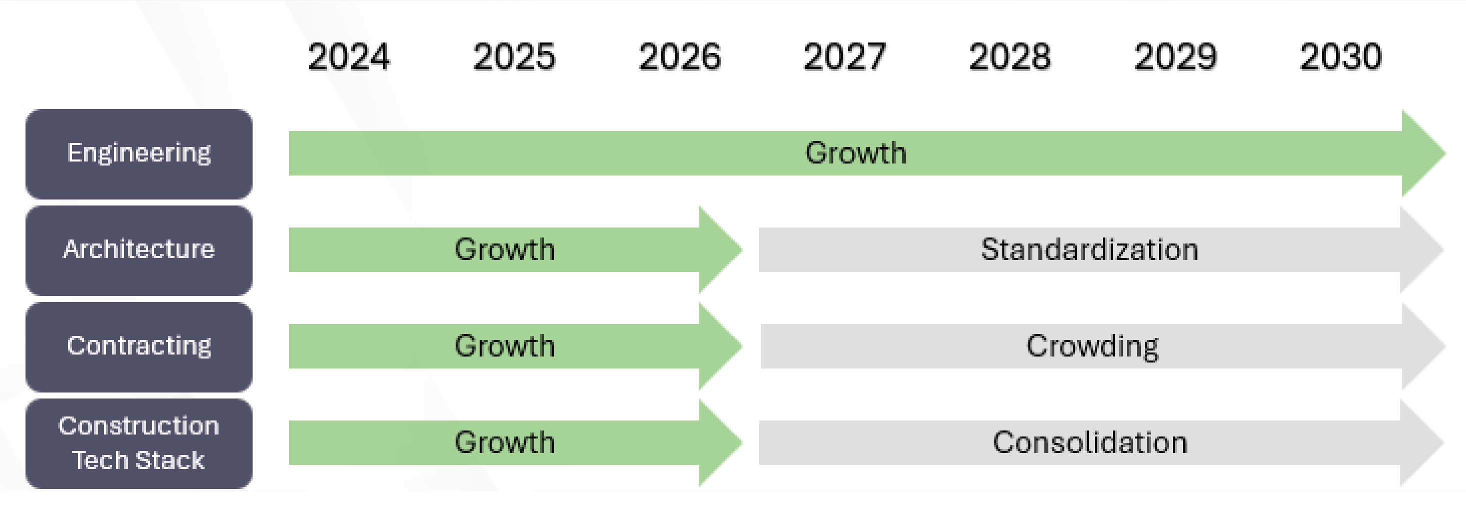
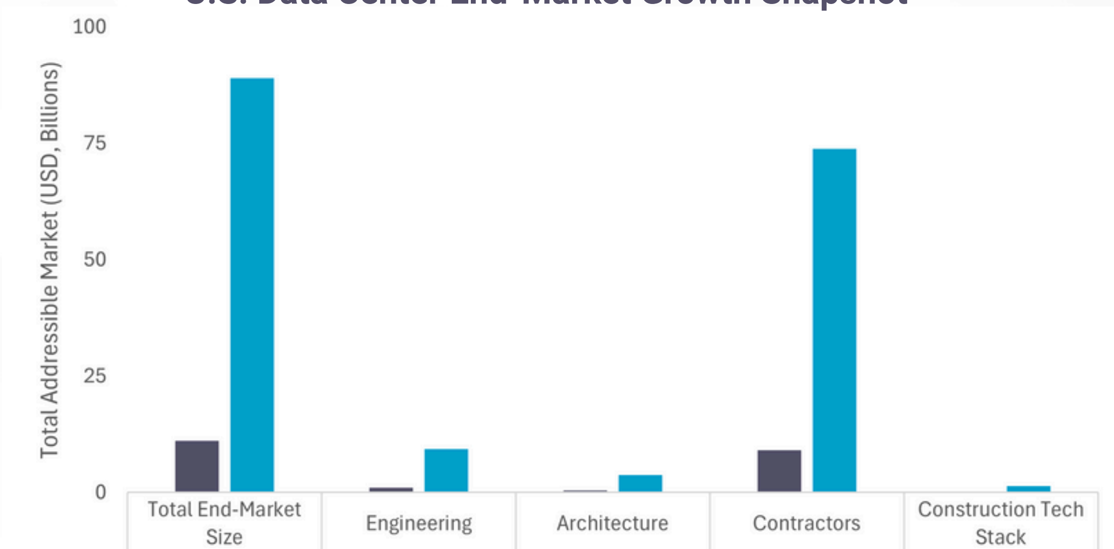


Figure 6 Simplified Data Center Construction End Market Assumptions
Source(s): MSI Economics

MSI Economics U.S. Data Center Spending and End-Market Forecast

U.S. data center construction spending is projected to grow from $11.1 billion in 2022, the beginning of AI commercialization, to a peak of $89.0 billion in 2026, an increase of over 782%. A snapshot of these two time frames and specific end-markets are shown in Figure 7.

U.S. Data Center End-Market Growth Snapshot



	Total End-Market Size	Engineering	Architecture	Contractors	Construction Tech Stack
2022	11.1	1.08	0.443	9.1	0.149
2026	89	9.3	3.8	73.8	1.4

Figure 7 U.S. Data Center End-Market Growth Snapshot
Source(s): MSI Economics

- **Engineering:** Expands from $1.08 billion in 2022 to $9.3 billion in 2026, an 836% growth rate, underscoring the complexity of systems integration and design.
- **Architecture:** Grows from $443 million in 2022 to $3.8 billion in 2026, up 837%, highlighting greater demand for specialized facility design.
- **Contracting:** Rising from $9.1 billion in 2022 to $73.8 billion in 2026, representing a 789% increase, this segment drives the majority of total spend, reflecting the scale of labor and capital needed for delivery.
- **Construction Tech Stack:** Accelerates from $149 million in 2022 to $1.4 billion in 2026, nearly 931% growth, reflecting rapid adoption of digital project planning and delivery tools. These results are highlighted in Table 2.

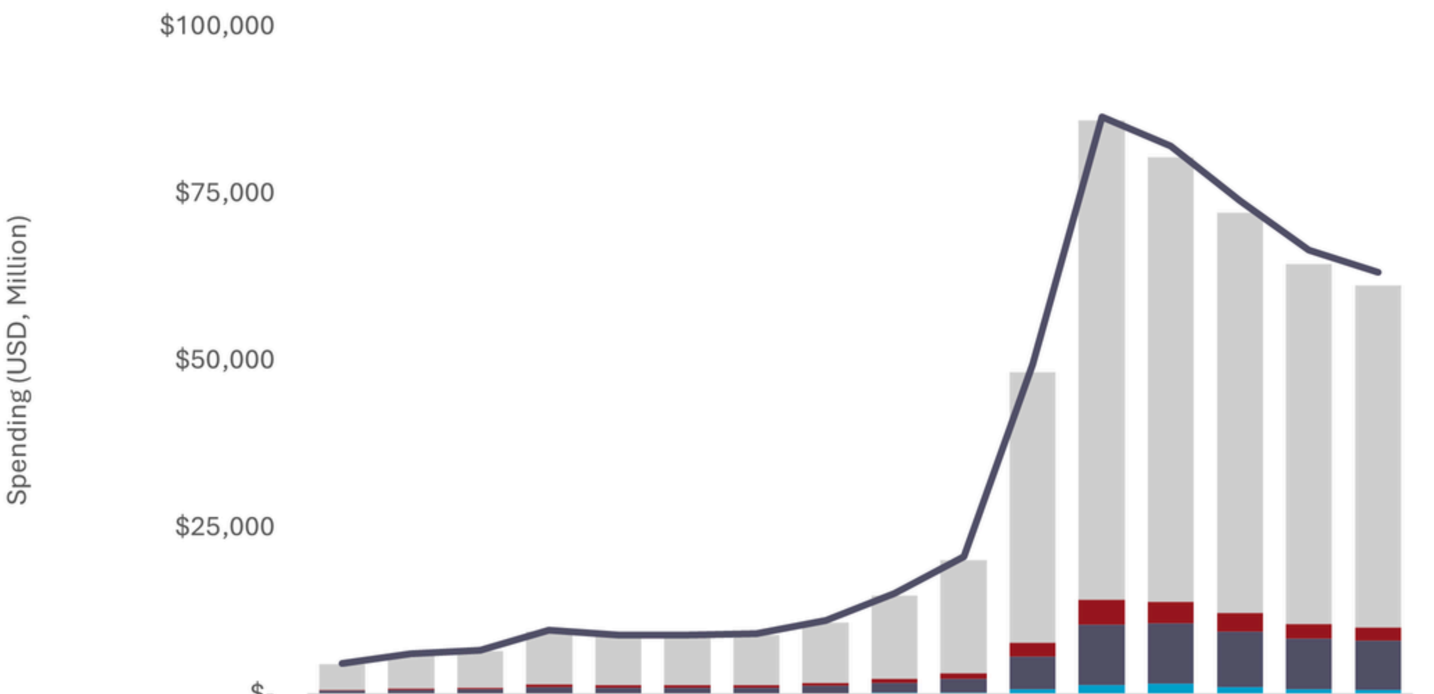
Table 2 MSI Economics Data Center Growth Forecast

MSI Economics Data Center Growth Forecast

	2022-2026 Growth	2022 - 2026 CAGR
US Data Center Spending	782%	67.2%
Engineering	836%	70.0%
Architecture	837%	70.1%
Contracting	789%	67.6%
Construction Tech Stack	931%	74.7%

After the 2026 peak, total spending moderates but stabilizes well above historic levels, with 2030 still forecast at $61.6 billion, more than 5x higher than 2022. Further detail on these end-markets and the full MSI Economics forecast are shown in Figure 8.

MSI Economics Data Center Spending and End-Market Forecast



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Contracting	$3,777	$4,944	$5,439	$7,897	$7,307	$7,288	$7,481	$9,086	$12,43	$16,91	$40,48	$71,71	$66,49	$59,84	$53,85	$51,16
Architecture	$184.5	$241.5	$265.7	$385.8	$357.0	$356.0	$365.5	$443.9	$607.4	$826.3	$2,073	$3,715	$3,201	$2,807	$2,160	$1,973
Engineering	$451.4	$590.9	$650.0	$943.8	$873.3	$871.0	$894.0	$1,085	$1,486	$2,021	$4,937	$9,072	$9,029	$8,311	$7,646	$7,422
Construction Tech Stack	$61.71	$80.78	$88.86	$129.0	$119.3	$119.0	$122.2	$148.4	$203.1	$276.3	$740.6	$1,382	$1,641	$1,108	$731.4	$631.6
US Data Center Spending	$4,595	$6,014	$6,616	$9,606	$8,888	$8,865	$9,100	$11,05	$15,12	$20,57	$49,37	$86,40	$82,08	$73,87	$66,49	$63,16

Figure 8 MSI Economics Data Center Spending and Subsector Forecast
Source(s): MSI Economics

Construction End-Market Sizing Methodology

- **Engineering:** Based on revenue derived from Building Design + Construction 2024 Giants 400 report.[45]
- **Architecture:** Based on revenue derived from Building Design + Construction 2024 Giants 400 report.[46]
- **Contracting:** Labor, materials, and equipment; approximate remaining total spend in industry after other sectors.
- **Construction Tech Stack:** Revenue derived from approximate IT and subsequent software spend within construction industry.[47, 48]
- **U.S. Data Center Spending:** Demand-focused forecast based on committed spending, market constraints, and subsector growth factors.

[45] Building Design + Construction | 2024 Giants 400 Report

[46] Building Design + Construction | 2024 Giants 400 Report

[47] Market Research Future | Construction Software Market Research Report

[48] Construction Dive | What's driving construction technology spending in 2023 and 2024?

Conclusion

The U.S. data center market is entering a defining decade, with growth rates and capital commitments that surpass nearly every other nonresidential sector. What began as a steady infrastructure category has now accelerated into an AI-driven surge, reshaping the priorities of owners, contractors, and technology providers alike. The near-term peak of spending in 2025–2026 will test the limits of supply chains, labor availability, and power infrastructure, while longer-term demand for distributed inference capacity ensures that the sector will remain elevated well into the next cycle.

For stakeholders, the message is clear: traditional forecasting tools are no longer sufficient. Relying solely on smooth CAGR models risks underestimating the front-loaded nature of the current boom. Instead, firms must anchor their planning in real-time capital deployment, project-level data, and the realities of grid interconnection queues, labor bottlenecks, and equipment lead times. Success will come to those who can balance near-term intensity with long-term adaptability - designing projects that meet today's density requirements while retaining flexibility for the next wave of inference-led growth.

MSI Economics' integrated forecast illustrates both the scale of the opportunity and the complexity of execution. Contractors will remain at the center of delivery, capturing the majority of spend, while engineers and architects provide critical expertise to navigate power, cooling, and standardization challenges. The rapid adoption of construction technology tools will further define winners and losers as firms pursue efficiency under tighter constraints. Above all, the next five years will reward those who secure early positions in power and labor markets, build resilient supply chains, and invest in planning methods that can adjust in real time.

MOCA SYSTEMS, INC.

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Economic services are a vital part of successful construction planning.

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- Planning and Programming
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Sizing the Surge: U.S. Data Center Construction Outlook to 2030

Sizing the Surge is a special edition report that explores one of the most pressing questions in today's construction industry: What is the real size of the U.S. data center construction surge, and how will it shape the markets that design and build these massive facilities? This report leverages MSI's leadership in the data center development sector to provide unique insight into a sector experiencing unprecedented growth.

Alongside this special edition, MSI regularly publishes **Today's Construction Economy,** a quarterly report authored by MSI lead economist, Brandon Michalski that offers a comprehensive analysis of the construction industry's current state and its role within the broader U.S. economy. By blending economic data with qualitative insights, this report delivers timely and actionable intelligence to thousands of industry stakeholders.

Brandon Michalski Principal, Construction Economist, MSI

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