The US Data-Center Buildout, in One Page

Prepared 25 Nov 2026 · compiled from public sources only · companion files: interactive map (HTML), 77 satellite evidence cards, 57 state distribution maps

How big is it?

5,427
facilities in Cloudscene directory

4,038
sites in Atlas of DC Politics (incl. planned/retired)

~39 GW
operating inventory (JLL, mid-2026)

~35 GW
under construction; ~1% vacancy, 92% pre-leased

77
frontier AI campuses tracked site-by-site

12.6 → 33 GW
frontier campuses: IT power now → planned

Where?

- **Virginia (N. Virginia)** still the largest colo market (~728 listings); **Texas** fastest-growing hyperscale state (~605).
- AI gravity centers: **Abilene TX** (OpenAI/Oracle/Crusoe), **Abilene-area Pecos/Midlothian** (Google, Microsoft SAT40/14), **Mount Pleasant WI** (Microsoft Fairwater), **New Carlisle IN** (Microsoft), **Lordstown OH / New Albany OH**, **Stargate NM** (OpenAI/Oracle/SB Energy), **Meta Prometheus LA / Hyperion LA**, **Madison MS** (AWS Rainier/Anthropic).
- 15 campuses exceed 1 GW planned; largest single site ≈ 2.3 GW (Fairwater, WI).

Who pays / builds / powers?

- Hyperscalers self-fund (Microsoft FY26 capex guidance ≈ $87.7B/quarter run-rate); OpenAI camps use JV + private credit (Blue Owl 80% of Hyperion; BlackRock JV in El Paso; Oracle leases).
- EPC: Turner, DPR, Holder, Mortenson, Brasfield&Gorrie recur across sites.
- Power: behind-the-meter gas (Williams/AEP at Prometheus), fuel cells (Bloom at Stargate NM), utility PPAs (Entergy, Alliant, Georgia Power, WE Energies); grid queues are the binding constraint.
- Chips: NVIDIA Blackwell/Rubin dominant; AWS Trainium and Google TPU sites sit outside NVIDIA's shipment base.

Top frontier campuses (IT power, GW)

Campus	Owner	State	Now	Planned	Status
Microsoft Fairwater	Microsoft	WI	0.37	2.26	operational
Microsoft New Carlisle	Microsoft	IN	0.20	1.93	operational
OpenAI Stargate NM	OpenAI/Oracle	NM	0.15	1.75	building
Meta Hyperion	Meta/Blue Owl	LA	0.00	1.63	building
xAI Colossus 2	xAI	MS	0.30	1.53	building
OpenAI Stargate Abilene	OpenAI/Oracle/Crusoe	TX	0.82	1.65	building
Meta Prometheus	Meta	LA	0.25	1.44	building
AWS Madison (Rainier)	Amazon	MS	0.28	0.68	operational

Stalled, cancelled, contested

- cancelled QTS "Digital Gateway" VA — $24.7B project terminated 2 Jul 2026.
- withdrawn Tract Maricopa AZ — $14B campus application withdrawn.
- moratorium New York EO 62 (14 Jul 2026): pause on new ≥50 MW builds; ~11 states weighing limits; local bans in dozens of counties (≈40% of ballots pro-restriction in 2025-26).
- 215 retired/cancelled sites in Atlas; 58 formally withdrawn — a real but small failure rate vs ~833 announced project groups.

How solid are these numbers?

- Three independent catalogs cross-checked at address level: 82.7% of sampled facilities confirmed by ≥2 sources; directories miss self-built AI camps (Abilene absent from Cloudscene) and double-count some cards — treat counts as ranges, not totals.
- Top-down sanity check vs NVIDIA: cumulative Hopper+Blackwell/Rubin shipments (~10M H100-equivalents) plus custom silicon (Trainium/TPU) is consistent with tracked frontier capacity at its upper bound; implied 0.93 kW per H100e is physically plausible.
- Coordinates: frontier campuses = building footprints; Atlas = city/county centroids; ~44% of Cloudscene rows carry coordinates.

If you're reading this in the US — three things that would help:

- A phone photo of any named campus from a public road (date + GPS on) — ground-truth for our satellite timeline.
- County planning-commission agendas/permits for a site near you (usually public PDFs).
- Local utility interconnection-queue notices or town-hall coverage — the earliest signal of new builds.



Per-state map (57 available): Atlas status × Cloudscene × frontier camps, policy stance bar on top.



Satellite evidence card: OpenAI Stargate Abilene — AOI outlines over Esri imagery (orange = buildings under construction).



Microsoft Fairwater, WI — largest single campus (~2.3 GW planned); cards double as monthly construction-monitoring baselines.

Sources: Cloudscene directory (Nov 2026) · Atlas of Data Center Politics, Zenodo 23645541 (data 2026-10-08) · Epoch AI frontier data-center map (Nov 2026) · JLL, Synergy, DCD, IIR, Barclays research notes (2025-26) · Esri World Imagery for satellite cards. Full methodology & confidence grading: cross-validation report (Chinese) in project folder 06.