Powering the Buildout: Where U.S. Data Center Development Is Happening

Texas Water and Power Supply Issues

"Yankee Doodle Data" — Data Centers and the Environment

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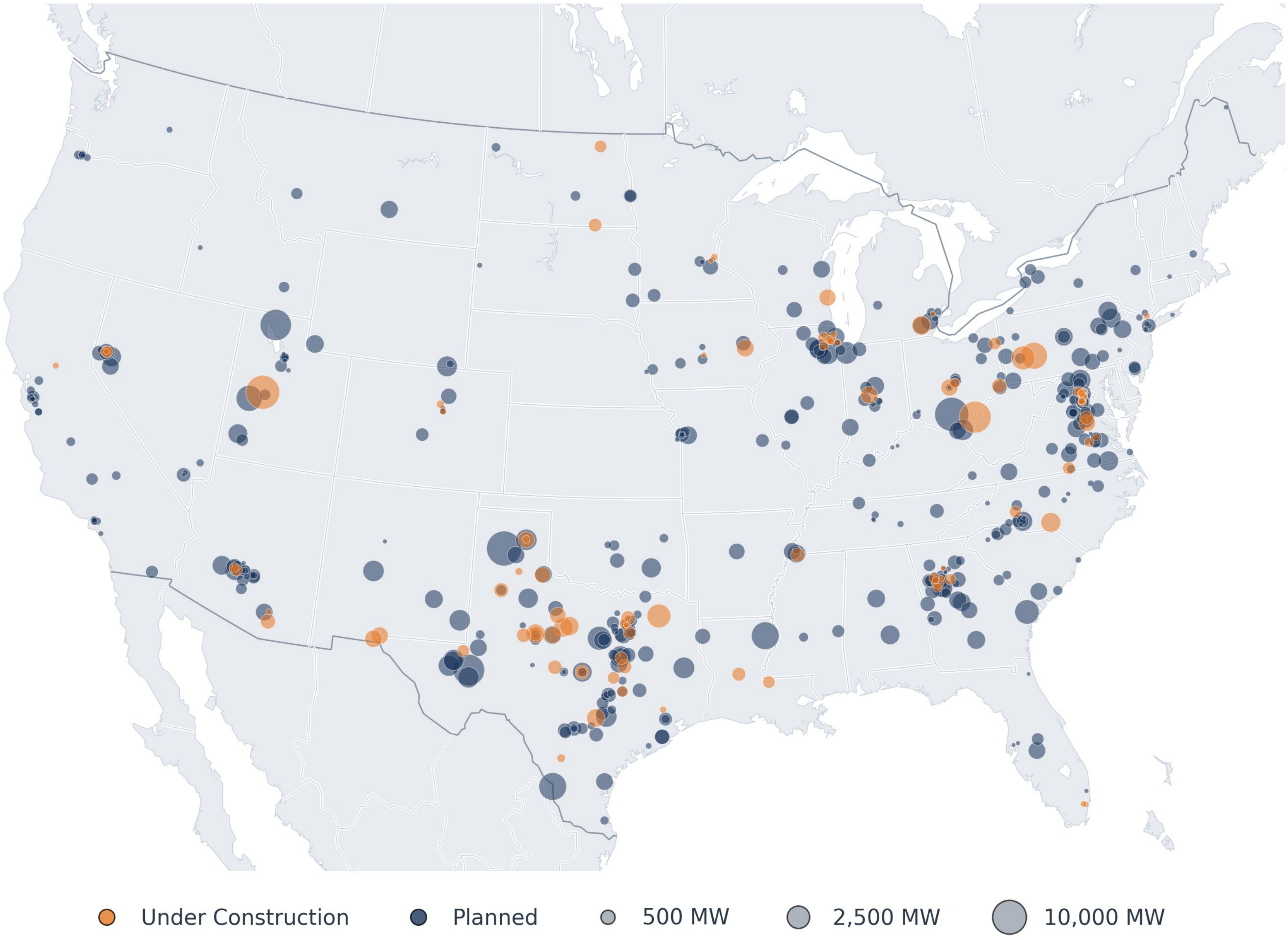
A National Land Rush: 567 Projects, 295 GW in the Pipeline



95

projects under construction
60.5 GW of capacity

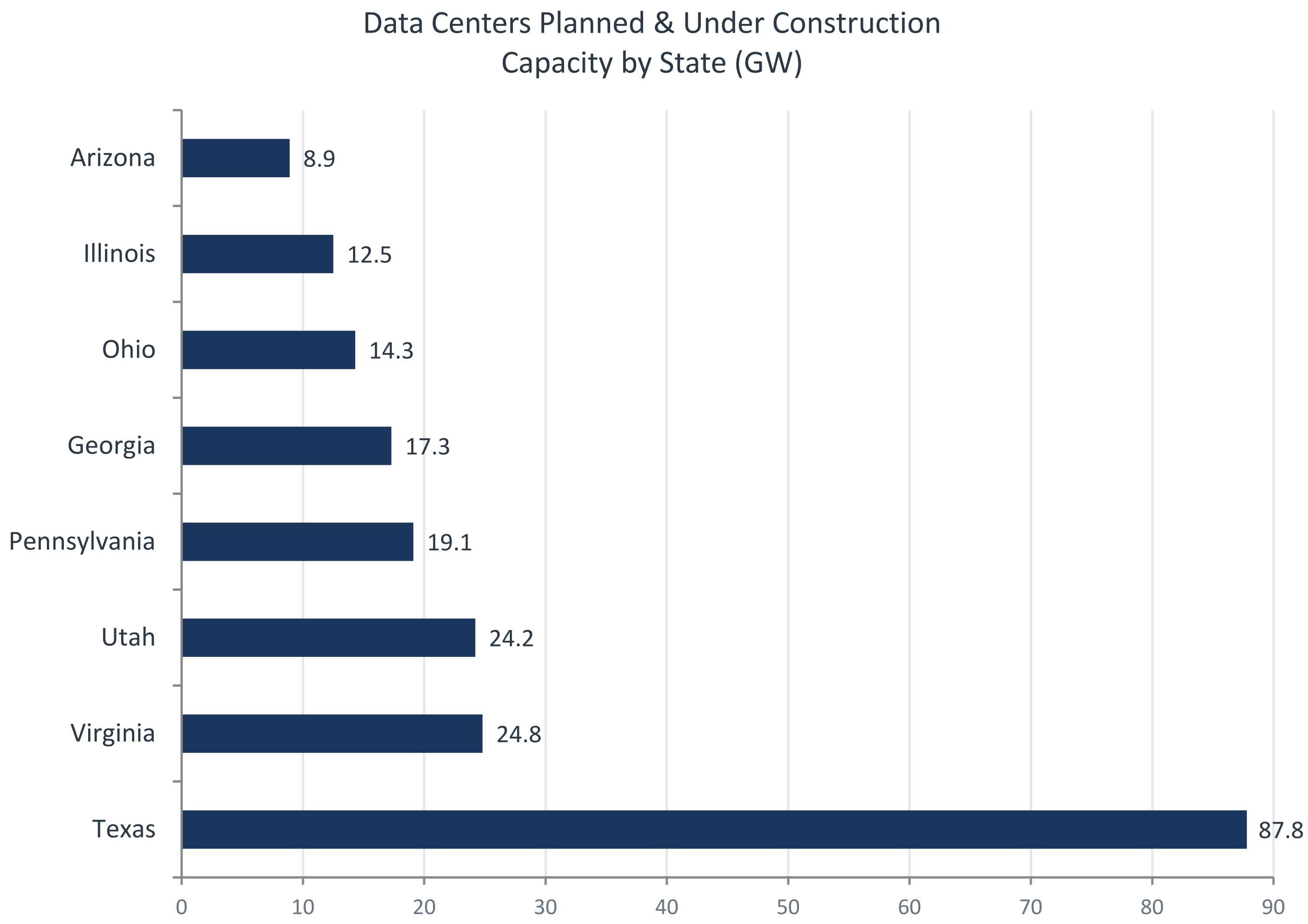
472

projects planned
234.5 GW of capacity

Bubble location = project site; bubble size scales with disclosed power capacity (MW). U.S. projects under construction or planned with disclosed capacity; excludes operational and withdrawn projects.

Depictions are indicative only — generated with AI assistance from data sourced from New Project Media and supplemented with independent research (July 2026).

Where the Capacity Is Concentrated



Concentration

The top 8 states hold ~71% of all disclosed pipeline capacity.

Scale shift

Single campuses now announce 5–11 GW — the size of entire utility systems.

Data sourced from New Project Media and supplemented with independent research (July 2026).

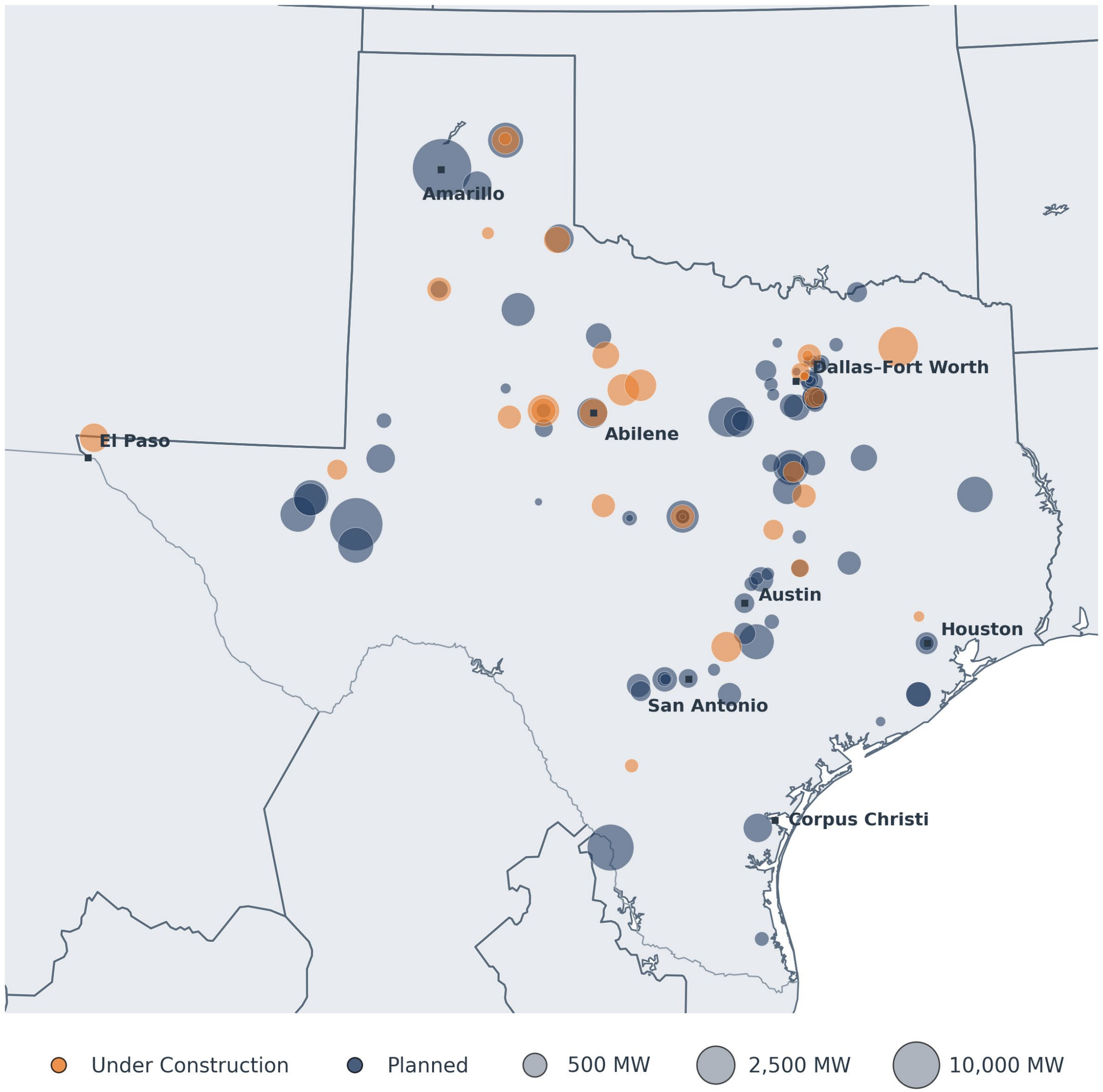
Texas Leads the Nation

124
Texas projects in the pipeline — 41 more than Virginia (83), the next closest state

87.8 GW
disclosed capacity — 3.5x Virginia, the long-time data center capital (24.8 GW)

30
projects already under construction in Texas, totaling 18.2 GW

4 hubs
Dallas–Fort Worth, Abilene / West Texas, the Panhandle, and the Austin–San Antonio corridor



Texas total includes GW Ranch (Pecos Co.), whose 7,650 MW reflects TCEQ-permitted onsite generation capacity, not confirmed IT load.

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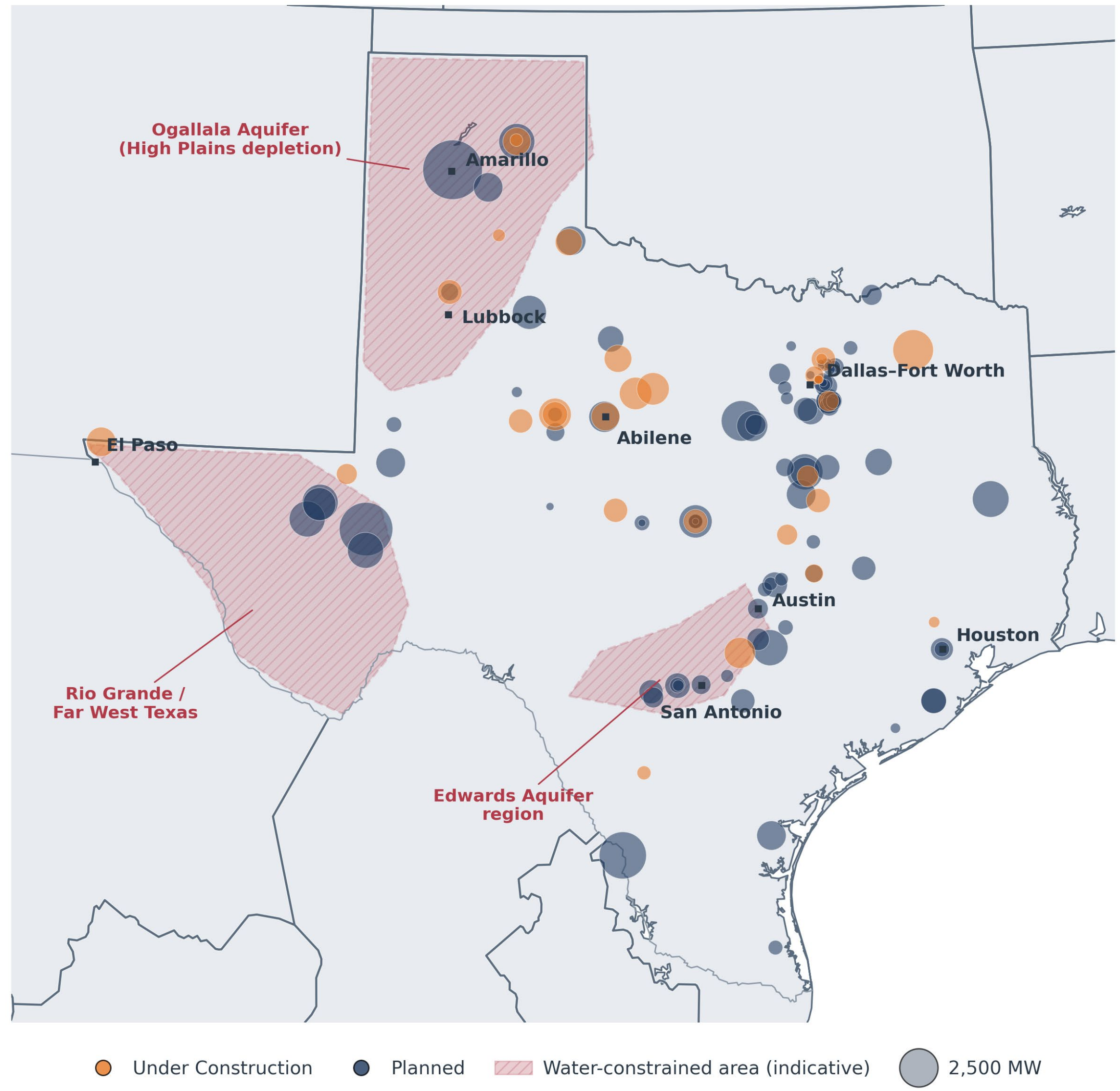
The Buildout Is Heading Into Water-Stressed Territory

22% of Texas under drought conditions as of July 21, 2026 (U.S. Drought Monitor)

3–9% of statewide water use could come from data centers by 2040 (University of Texas estimate)

3.6M acre-feet projected statewide supply shortfall by 2030 in a drought of record (2027 State Water Plan, adopted July 2026)

Severe watering restrictions in Lubbock and El Paso — structural, year-round constraints; New Braunfels recently moved from Stage 2 to Stage 1 atop the Edwards Aquifer recharge zone



Shaded zones are indicative composites of documented constraint areas: Ogallala/High Plains depletion, Rio Grande & Far West Texas restrictions, and the regulated Edwards Aquifer region — not precise hydrological boundaries.

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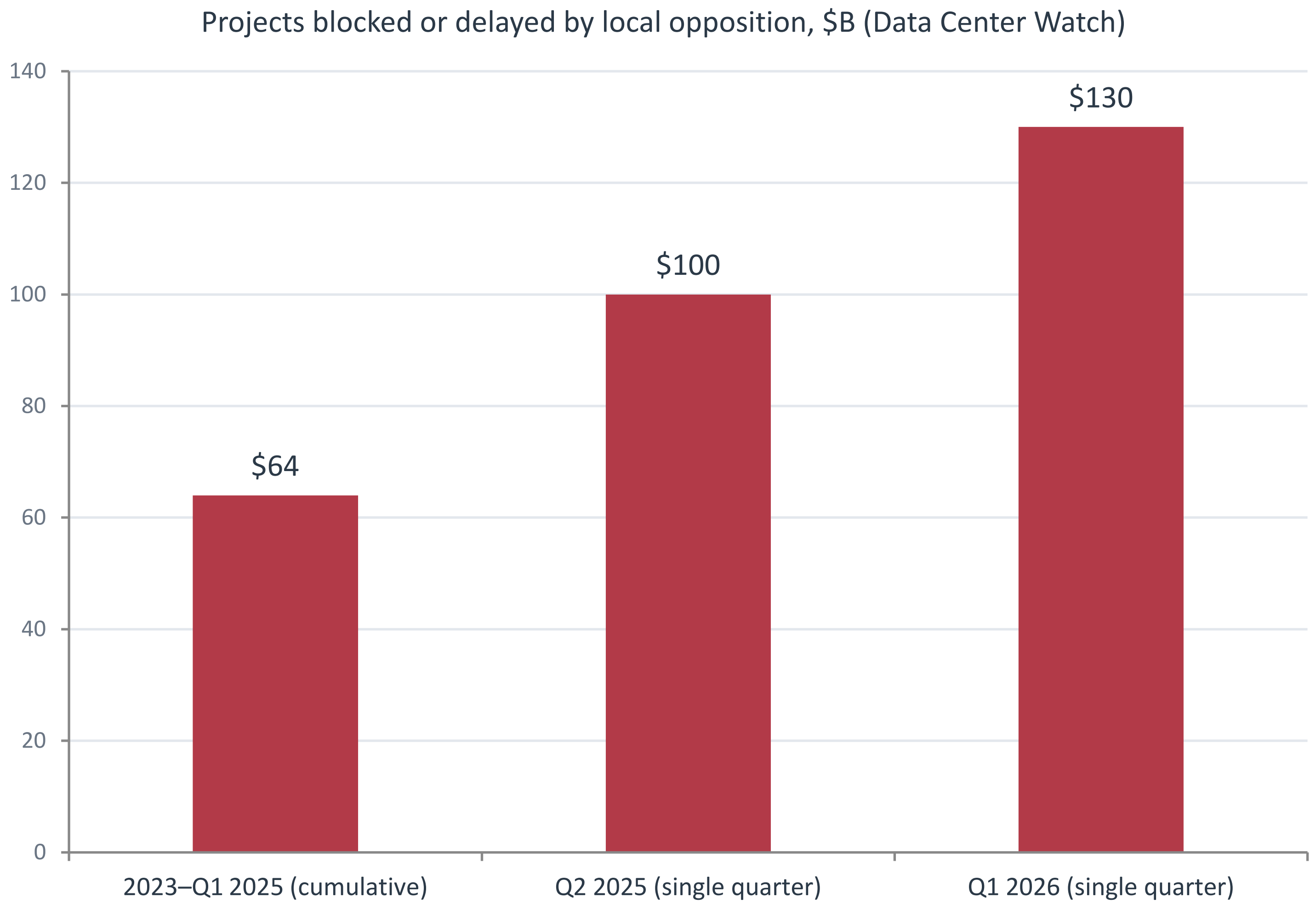
Opposition Is Now a Material Development Risk



833 groups

active opposition groups across 49 states — more than double the 396 at the end of 2025. (Data Center Watch)

116 moratoria

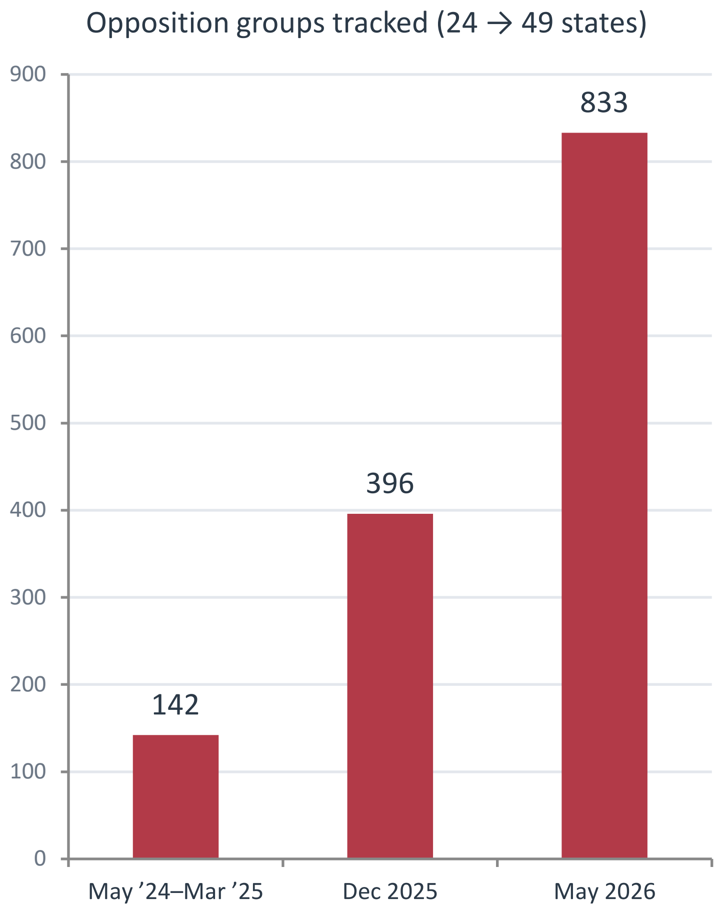
local moratoria enacted; 300+ state bills filed in the first six weeks of 2026; statewide moratoria proposed in 14 states. (Data Center Watch)

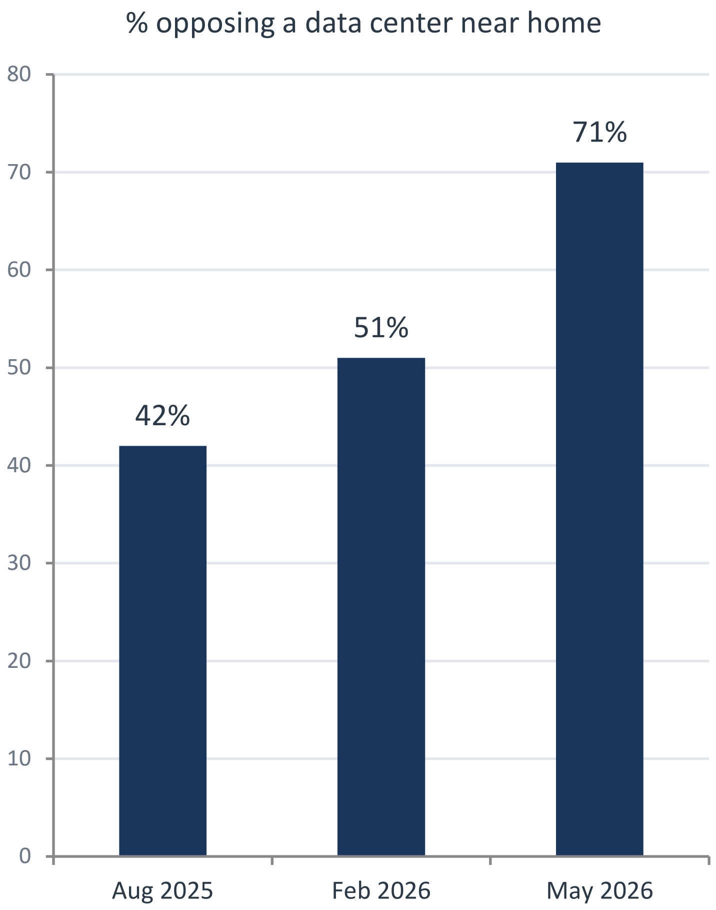
2 of 3

projects protested by organized opposition end up blocked or delayed. (Data Center Watch)

Q2 2025 figure is an industry estimate (~$100B, S&P Global). Community opposition drives cancellations; interconnection queues drive delays — PJM projects now average ~7 years from queue entry to energization.

Opposition Has Escalated on Every Front Since 2024





3x

state data center legislative bills tripled — 151 bills across 31 states in 2025, more than 3x 2024; 264 more introduced by April 2026 (Latitude Media)

116

local moratoria by May 2026, up from essentially none before 2025 — St. Charles, MO was among the first cities, August 2025 (Data Center Watch; Stateline)

1st

statewide pause now in effect — New York's EO 62 (July 2026); statewide moratorium bills were filed in 11–14 states in 2026 (governor.ny.gov; Stateline; Good Jobs First)

Group counts: Data Center Watch report editions (first report covers May 2024–Mar 2025). Polling: Heatmap Pro / Embold Research, same question across waves — a 29-point rise in nine months.