US Data Center Daily Briefing

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KEY THEMES

- Panasonic evaluating "some lines" of its De Soto, Kansas factory for data-center cells
- Panasonic targets fiscal 2028 (ending March 2029) for Kansas data-center cell production
- No primary-source Kansas capex carve-out; modules expand in Mexico and Japan, not De Soto
- ERock files NYSE IPO as "EROC" at $20–$23/share, naming data centers as customers

Why Panasonic's De Soto "pivot" is partial, cell-only, and capex-undisclosed

Panasonic Energy isn't converting its De Soto, Kansas plant from EV batteries to data-center batteries — it's evaluating a partial line shift. Panasonic's own newsroom says it is "looking into using some lines of its Kansas Factory", one of its automotive lithium-ion cell facilities, for data-center battery cells, with mass production targeted in fiscal 2028, the year ending March 31, 2029. The same site still produces automotive 2170 cells, having begun mass production in July 2025 toward about 32 GWh of annual capacity. Kansas is assigned battery cells; Panasonic ties module expansion to Mexico and Japan.

- Panasonic eyes some Kansas lines for data-center battery cells – The De Soto plant remains an automotive 2170-cell factory; Panasonic targets fiscal 2028 (ending March 31, 2029) for data-center cell mass production on some Kansas lines.
- Kansas De Soto plant carries a ~$4B EV battery footprint – Kansas framed the project as up to $4 billion of investment and 4,000 jobs, with APEX incentives estimated at $829.2 million.
- Panasonic ties data-center module expansion to Mexico and Japan – For energy storage modules, Panasonic is strengthening Japan capacity and adding Mexico lines and a new nearby plant, keeping module work outside Kansas.
- ERock launches IPO targeting data-center power loads – The natural-gas generator maker launched a roadshow on June 1, 2026 for 27,906,977 Class A shares at $20.00 to $23.00, to list on the NYSE under ticker EROC.
- ERock names data centers among its core customers – Its proprietary natural-gas generators help facilities address grid constraints, interconnection delays, and outage risks, serving data centers, utilities, manufacturers, healthcare and government.

- KKR launches Helix Digital Infrastructure with $10B+ committed – KKR, the Kuwait Investment Authority, NVIDIA and Vistra anchored more than $10 billion in long-duration commitments to build AI data centers, power and connectivity.
- Vistra to be Helix's preferred power provider; NVIDIA a strategic partner – Vistra is named preferred power provider and NVIDIA will support deployment of DSX AI factory-aligned infrastructure; ex-AWS chief Adam Selipsky is co-founder and CEO.
- Chhattisgarh draws ₹9,580 crore in investment proposals – Seven firms submitted proposals at the Hyderabad Investors Connect, led by Hypernext Data Center's ₹4,200 crore data centre plan, with ~7,800 direct jobs expected.

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