US Data Center Daily Briefing

January 26, 2026

KEY THEMES

- Virginia considering pause on hyperscale approvals tied to interconnection backlogs
- Stronger state-level review of grid capacity, ratepayer and environmental impacts
- US emissions rose in 2025; data centres and crypto cited as a driver
- Power mix shifts: coal up, solar up, zero-carbon share at 42% in US electricity
- AI-driven electronics and server supply chain growth signalled by Taiwan output surge

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Global data centres & power — daily briefing (UTC 2026-01-26)

Audience: Institutional asset managers and infrastructure fund managers focused on data centres, power, and grid infrastructure.

Top news (3)

- **Virginia push to pause hyperscale approvals until interconnections clear.** The Piedmont Environmental Council is backing two bills that would slow new hyperscale approvals and tighten state review around grid capacity and consumer/environmental impacts. See: PEC backs Virginia bills pausing hyperscale data center approvals.
- **US emissions rose in 2025, with data centres and crypto flagged as a driver.** A Rhodium Group study says US GHG emissions increased **2.4%** to **~5.9bn tons CO2e**, citing "explosive growth" in data centres/crypto alongside weather and fuel-price effects. See: U.S. carbon pollution rises 2.4% in 2025, reversing reductions.
- **Taiwan industrial production hit a record on AI-driven electronics/servers demand.** Taiwan reported **+16.70%** industrial production in 2025 (index **112.16**), with strong growth in electronics components and computer/optoelectronics tied to AI-linked supply chains (including servers). See: Taiwan industrial production hits record in 2025 on AI boom.

Key deals & projects

No specific new data centre deals/projects, financings, or capex items were disclosed in today's stories.

Power, grid & interconnection highlights

United States (Virginia)

- PEC backs Virginia bills pausing hyperscale data center approvals:
  - **HB1515 (Del. Irene Shin):** would **temporarily pause approvals** of local hyperscale data centre projects **until pending grid interconnection requests are fulfilled**.
  - **HB155 (Del. Josh Thomas):** would require the **State Corporation Commission** to evaluate:
    - **Grid capacity**
    - **Customer bill impacts**
    - **Environmental and public health effects**
    - Consistency with **state clean energy policy**
    - before issuing **certificates of operation**.

United States (system-wide)

- U.S. carbon pollution rises 2.4% in 2025, reversing reductions:
  - Rhodium Group (Jan. 13) estimates **2025 emissions +2.4%** to **~5.9bn tons CO2e** (**+139m tons vs 2024**).
  - Drivers cited include **cool winter heating demand**, **data centres/cryptocurrency mining growth**, and **higher natural gas prices**.
  - Power mix signals noted in the study:
    - **Coal-fired power +13%**
    - **Solar +34%**
    - **Zero-carbon sources = 42%** of US electricity

Policy & regulation

United States (Virginia)

- PEC backs Virginia bills pausing hyperscale data center approvals would, if advanced:
  - Increase **regulatory friction and timeline risk** for hyperscale development in Virginia.
  - Place explicit emphasis on **interconnection queue clearing**, **ratepayer impacts**, and **environment/health review** as prerequisites for approvals/operations.

Supply chain / demand indicators

Taiwan

- Taiwan industrial production hits record in 2025 on AI boom:
  - **2025 industrial production +16.70%** to index **112.16**.
  - **Manufacturing subindex +17.87%** to **113.12**.
  - Sector growth highlights: **electronics components +24.71%**, **computer/optoelectronics +56.43%**.
  - **December +21.57% YoY**; Taiwan forecasts **January manufacturing index 130.69–134.69** (**+35.6–39.7% YoY**).

2-line wrap

Virginia lawmakers are being pressed to link hyperscale approvals to grid interconnection readiness and broader system impacts.
Separately, macro indicators point to accelerating AI-driven compute hardware demand while US emissions data highlights the system-wide power implications of data centre growth.

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