US Data Center Daily Briefing

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KEY THEMES

- Taiwan export orders record US$76.91bn on AI servers
- Information and communications orders +102% to US$25.15bn
- MSEDCL renewables mix 13% to 52% with 45,000MW PPAs
- MSEDCL solar ₹2.90/unit cuts average costs to ~₹3.70/unit

Taiwan just printed a number that should make anyone tracking AI infrastructure sit up: January export orders hit a record US$76.91 billion, up 60.1% year-on-year, with the government explicitly pointing to AI-related servers and cloud demand as key drivers. The Lunar New Year base effects helped, but the composition of the growth is the tell — the plumbing of AI is showing up in hard trade data.

The Big Stories

Taiwan January export orders hit record US$76.91 billion is the cleanest "AI capex is real" datapoint we've had in a while. The Ministry of Economic Affairs said export orders surged 60.1% YoY to US$76.91 billion, with information and communications orders jumping 102.0% to US$25.15 billion and electronic product orders rising 78.6% to US$32.59 billion. The stated drivers — AI-related servers and cloud services — matter because they link end-market demand directly to the supply chain that feeds data halls, not just to chip headlines.

What to watch next is whether this remains concentrated in a few categories (servers, networking, storage and adjacent electronics) or broadens into a more generalised electronics upswing. Either way, when "AI servers" and "cloud services" are singled out as export-order growth engines at this scale, it's a reminder that the bottlenecks and lead-times investors worry about in data centres are mirrored upstream in manufacturing orders — and can move quickly when demand inflects.

Behind the Headlines

MSEDCL targets 52% renewables and cuts industrial tariffs is an underappreciated "cost of compute" story in power-market clothing. Maharashtra's utility says it will lift renewables in its mix from 13% to 52% over five years, supported by over 45,000MW of PPAs already signed and new transmission-and-distribution investment to evacuate green power. It also says it has cut

tariffs “for the first time” and expects net savings of about ₹66,000 crore over five years, pointing to solar procurement around ₹2.90/unit as a key reason average costs fell from ₹5.70 to roughly ₹3.70/unit.

The significance here isn’t just decarbonisation signalling; it’s the explicit tie between renewables procurement and industrial tariff relief. If those cost claims hold up through grid buildout and integration, the next competition won’t only be about who can secure megawatts — it’ll be about who can secure cheaper megawatts in the right places, with the network investment to actually deliver them. For data centre operators and hyperscalers eyeing India, this is the kind of utility-level momentum that can reshape site selection and the economics of long-term power contracting.

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