

Weekly Market Brief

Actionable commercial intelligence for data center and energy infrastructure professionals.

Week of August 24 – August 30, 2026

Signal categories

Immediate Opportunities

Deals & Developments

Market Intelligence

8 Immediate Opportunities

7 Deals & Developments

7 Market Intelligence

Executive Summary

Rapid data center growth continued to reshape the power market this week, pushing developers toward new generation, powered-site acquisitions, and alternative grid interconnection strategies.

- New Jersey is set to solicit 150 MW for home batteries, providing significant procurement opportunities.
- Core Scientific has acquired Polaris DS for \$444 million, enhancing its power capacity by 440 MW.
- JLL reports North American data center demand doubled, reaching a record 25 GW in H1 2026.

This week's insight

8

Immediate Opportunities

7

Deals & Developments

7

Market Intelligence

Immediate Opportunities

Open RFPs, powered sites, procurement windows, and actionable commercial opportunities

8 Opportunities

Actionable Opportunity

New Jersey prepares solicitation for 150 MW home batteries

What happened

New Jersey is set to issue a solicitation for 150 MW of home batteries, signaling active investment in renewable energy storage solutions.

Why it matters

This procurement opportunity directly influences the energy sector, crucial for developers and suppliers engaged in renewable projects.

Immediate Opportunities

Opportunity details

Project: 150-MW solicitation for home batteries
Capacity: 150 MW
Location: New Jersey

Source

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Actionable Opportunity

New York power plant for sale for \$15 million

What happened

A 60 MW power plant on a 10-acre site in New York is up for sale with an asking price of \$15 million, currently generating power from natural gas.

Why it matters

This listing is vital for data center developers seeking existing infrastructure with established power generation capabilities.

Immediate Opportunities

Opportunity details

Project: New York power plant
Deal Value: \$15 million
Capacity: 60 MW
Acreage: 10
Location: New York

Source

[View Source →](#)

Actionable Opportunity

Oregon greenfield site available for \$3.75 million

What happened

A greenfield site in Oregon, featuring 25 MW grid power, is offered for \$3.75 million, with the buyer responsible for construction.

Why it matters

This opportunity appeals to developers looking for new powered land suitable for energy-intensive data centers.

Immediate Opportunities

Opportunity details

Project: greenfield grid power site
Deal Value: \$3.75 million
Capacity: 25 MW
Acreage: 10
Location: Oregon

Source

[View Source →](#)

Actionable Opportunity

Wyoming greenfield site for sale featuring 75 MW load

What happened

A 150-acre powered site in Wyoming offers 75 MW of grid power for sale, suitable for future site development by energy companies.

Why it matters

This site can attract developers planning to establish data centers needing reliable energy sources.

Immediate Opportunities

Opportunity details

Project: Powered Site Opportunity
Capacity: 75 MW
Acreage: 150
Location: Wyoming

Source

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Actionable Opportunity

Dallas TX powered site available for lease

What happened

A powered site in Dallas TX, offering 1.5 MW grid power for lease costs \$155/kW, with a minimum order of 30 kW.

Why it matters

Data center operators may find this leasing opportunity crucial for meeting energy demands without significant upfront costs.

Immediate Opportunities

Opportunity details

Project: Powered Site Opportunity –
Dallas TX (grid power)
Capacity: 1.5 MW
Location: Dallas, TX

Source

[View Source →](#)

Actionable Opportunity

2026 Q3-Q4 Renewables and Energy Storage RFP issued

What happened

SCPPA has issued an RFP for proposals on renewable energy resources and energy storage solutions for Q3 and Q4 of 2026, open until December 30.

Why it matters

This RFP is key for energy projects impacting procurement strategies and energy sourcing for data centers.

Immediate Opportunities

Opportunity details

Companies: SCPPA
Project: 2026 Q3-Q4 Renewables
Energy Resource and Energy
Storage Solutions RFP
Deadline: 2026-12-30

Source

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Actionable Opportunity

Indiana mining facility grid power available for \$3.5 million

What happened

An existing mining facility with 12 MW grid power in Indiana is available for purchase at \$3.5 million, negotiating price.

Why it matters

This site presents a valuable opportunity for data center developers needing immediate energy capacity.

Immediate Opportunities

Opportunity details

Project: existing mining facility grid power
Deal Value: \$3.5m (neg)
Capacity: 12 MW
Location: Indiana

Source

[View Source →](#)

Actionable Opportunity

SCPPA issues RFP for standalone energy storage solutions

What happened

The SCPPA has announced an RFP for standalone energy storage solutions, open until November 25, 2026.

Why it matters

This strategic procurement is significant for enhancing energy reliability and cost management for infrastructure operators.

Immediate Opportunities

Opportunity details

Companies: SCPPA
Project:
2026-SCPPA-Standalone-Energy-Storage-RFP
Deadline: 2026-11-25

Source

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Deals & Developments

Transactions, financings, projects, contracts, and commercial milestones

7 Deals & Developments

Commercial Development

Core Scientific completes Polaris DS acquisition for \$444 million

What happened

Core Scientific has finalized the acquisition of Polaris DS, adding 440 MW capacity and 40 acres for expansion in Oklahoma for \$444 million.

Why it matters

This acquisition signifies a major increase in capacity crucial for meeting escalating demand in the data center sector.

Deals & Developments

Commercial details

Companies: Core Scientific, Polaris DS

Project: Acquisition of Polaris DS

Deal Value: \$444 million

Capacity: 440 MW

Acreage: 40

Location: Muskogee, Oklahoma

Source

[View Source →](#)

Commercial Development

Landmark Dividend acquires data center in Jacksonville for \$8.1 million

What happened

Landmark Dividend has purchased a T-Mobile data center in Jacksonville, Florida for \$8.1 million, contributing to its infrastructure asset portfolio.

Why it matters

This transaction reflects ongoing investment activity in digital infrastructure, critical for market competitiveness.

Deals & Developments

Commercial details

Companies: Landmark Dividend,
T-Mobile, Gallatin Point Capital
Project: T-Mobile data center
Deal Value: \$8.1 million
Location: Jacksonville, Florida

Source

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Commercial Development

Talen Energy completes \$3.5 billion Cornerstone acquisition

What happened

Talen Energy has completed its \$3.5 billion acquisition of Cornerstone Generation, enhancing its operational capacity by 2,451 MW across multiple locations.

Why it matters

This acquisition bolsters Talen Energy's market position, essential for addressing growing energy demands.

Deals & Developments

Commercial details

Companies: Talen Energy Corporation, Energy Capital Partners
Project: Cornerstone Acquisition
Deal Value: \$3.5 billion
Capacity: 2.45 GW
Location: Lawrenceburg, Indiana; Waterford, Ohio; Mount Sterling, Ohio

Source

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Commercial Development

IBM and Together AI sign \$240 million cloud deployment deal

What happened

IBM has signed a \$240 million deal with Together AI for a large-scale Nvidia HGX B300 deployment set for Q1 2027.

Why it matters

This significant investment in cloud infrastructure will enhance operational capabilities of data centers.

Deals & Developments

Commercial details

Companies: IBM, Together AI
Project: Nvidia HGX B300 cloud deployment
Deal Value: \$240 million

Source

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Commercial Development

SpaceX to power chip factory in Texas with on-site generation

What happened

SpaceX plans to power its TeraFab semiconductor campus in Texas via on-site generation and battery storage, bypassing grid connection.

Why it matters

This initiative may reshape energy needs and strategies for data centers, particularly in semiconductor manufacturing.

Deals & Developments

Commercial details

Companies: SpaceX
Project: TeraFab semiconductor campus
Location: Texas

Source

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Commercial Development

NextEra secures \$3.3 billion for 10 GW of new generation

What happened

NextEra Energy has obtained \$3.3 billion in funding for natural gas generation projects, adding 10 GW capacity to meet data center power needs.

Why it matters

The funding directly supports infrastructure development vital for the growing energy demands of data centers.

Deals & Developments

Commercial details

Companies: NextEra Energy, US
Department of Commerce,
Government of Japan
Project: New Natural Gas
Generation Projects
Deal Value: \$3.3 billion
Capacity: 10 GW
Location: Texas, Pennsylvania

Source

[View Source →](#)

Commercial Development

Google confirms Project Clydesdale data center in Oklahoma

What happened

Google has revealed its involvement in the 506-acre Project Clydesdale data center campus near Tulsa, signifying significant investment in local infrastructure.

Why it matters

This project will significantly impact local energy demand and infrastructure, marking a commitment to sustainable growth.

Deals & Developments

Commercial details

Companies: Google, Beale Infrastructure
Project: Project Clydesdale
Deal Value: \$1 billion
Acreage: 506
Location: Tulsa, Oklahoma

Source

[View Source →](#)

Market Intelligence

Market conditions, grid constraints, policy changes, and strategic signals

7 insights

Market Signal

New York imports more electricity from Canada post-transmission line

What happened

Following the opening of the Champlain Hudson Power Express, New York imported 52 GWh of electricity from Canada, its highest since January 2025.

Why it matters

This development affects electricity supply dynamics, crucial for data center operators seeking reliable energy sources.

Market Intelligence

Market details

Companies: New York Independent System Operator (NYISO), Champlain Hudson Power Express (CHPE)
Project: Champlain Hudson Power Express
Location: New York City, New York

Source

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Market Signal

PJM proposes framework to connect data centers' power supplies

What happened

PJM has proposed a framework enabling new data centers to connect with their own power supplies, addressing increasing electricity demands.

Why it matters

This initiative is significant for data centers managing rising energy requirements, impacting procurement and operational strategies.

Market Intelligence

Market details

Companies: PJM Interconnection
Project: Interim Resource Adequacy
Service (IRAS)

Source

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Market Signal

JLL reports record 25 GW data center demand in H1 2026

What happened

Data center demand in North America doubled year-over-year in H1 2026, driven by hyperscalers and reaching a peak of 25 GW.

Why it matters

This unprecedented growth signals substantial market trends affecting data center investment and energy procurement strategies.

Market Intelligence

Market details

Companies: JLL
Capacity: 25 GW
Location: North America

Source

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Market Signal

10 GW of shovel-ready data center sites identified in Ohio

What happened

The pulp and paper industry offers over 10 GW of power capacity across mill sites in the U.S., appealing to data center developers.

Why it matters

This insight presents strategic opportunities for siting data centers, addressing energy interconnection challenges.

Market Intelligence

Market details

Companies: Google, Aligned
Project: AI compute campus on the closed Pixelle Chillicothe integrated mill
Deal Value: \$1.5B
Location: Ohio

Source

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Market Signal

Everpure secures contract with hyperscaler for storage solutions

What happened

Everpure has obtained a contract with a leading hyperscaler for its DirectFlash technology, marking growing recognition in the market.

Why it matters

This growth opportunity underscores the demand for innovative storage solutions in the data center sector.

Market Intelligence

Market details

Companies: Everpure
Project: DirectFlash technology storage solutions

Source

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Market Signal

Colos investing in GPU technology to meet demand

What happened

Colocation providers are increasing investments in GPU-as-a-Service to address overwhelming demand for compute capacity in data centers.

Why it matters

This trend signals substantial shifts in data center operations, emphasizing the need for increased GPU capacity.

Market Intelligence

Market details

DCD article by Bernie Margulies,
American Compute

Source

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Market Signal

PJM authorized to manage energy shifts during emergencies

What happened

The U.S. Department of Energy has allowed PJM to direct changes in electrical states at large-load data center sites during emergencies.

Why it matters

This regulation directly impacts data center performance and energy management during critical conditions.

Market Intelligence

Market details

Location: PJM Region

Source

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Speed to Intelligence

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Questions?

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