

2026
PA DATA
CENTER &
ENERGY
INNOVATION
SUMMIT

A Pennsylvania Moment: Data Centers | Power | Manufacturing



Buchanan

Study Sponsors

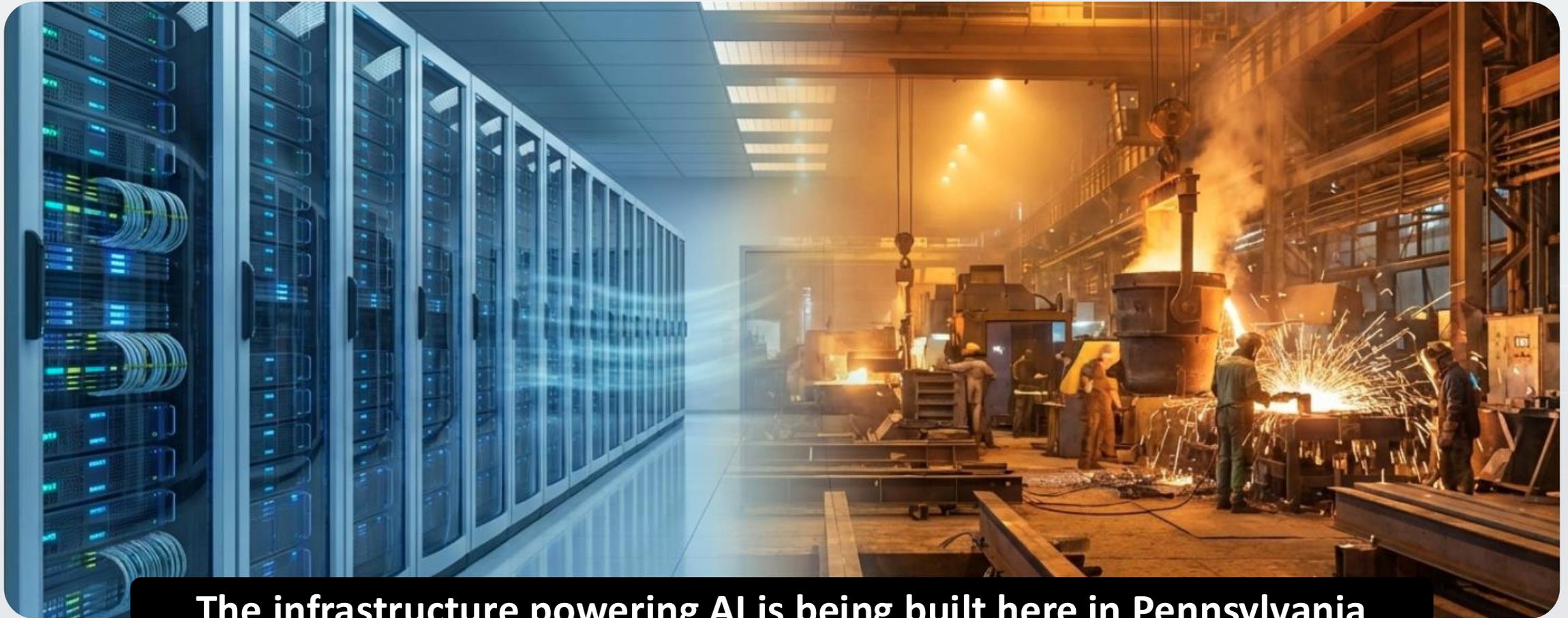


CATALYST CONNECTION®
WE GROW MANUFACTURING



The Cloud is Physical Infrastructure

AI runs on buildings, power, and manufacturing—not just code

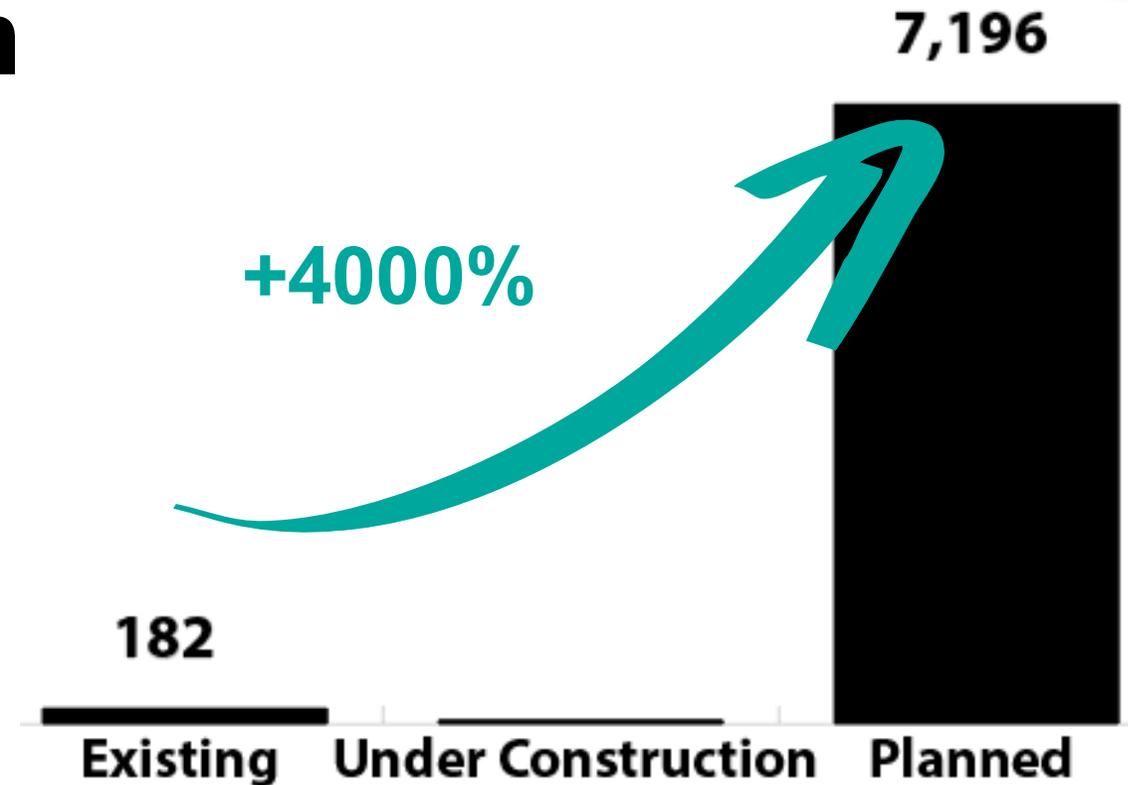


The infrastructure powering AI is being built here in Pennsylvania

The Data Center Boom

A 4,000% Surge in Data Center Capacity

- Growth from 182 MW → 7,196 MW
- One of the fastest-growing data center expansions in the country

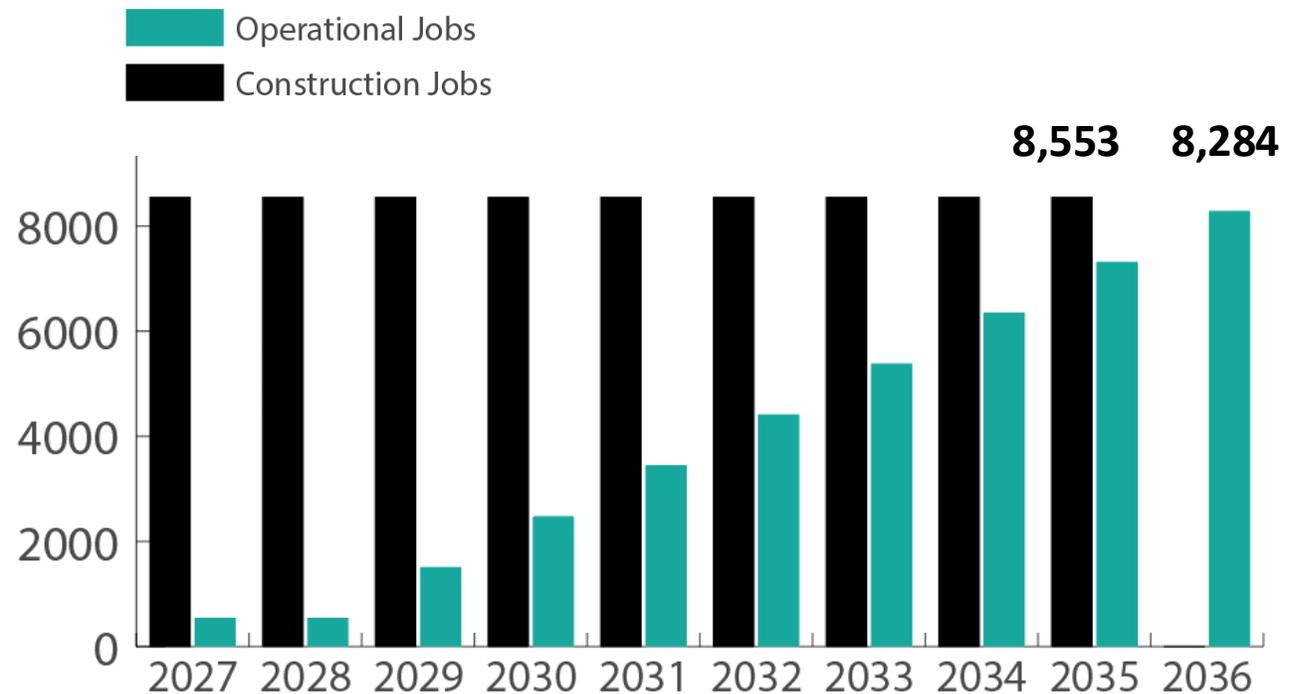


Existing, Under Construction, and Planned Data Center Capacity in Pennsylvania

From Construction Surge to Long-Term Jobs

By 2036, operational data center jobs will grow to almost **8,300**.

Construction drives early job growth — operations sustain long-term employment



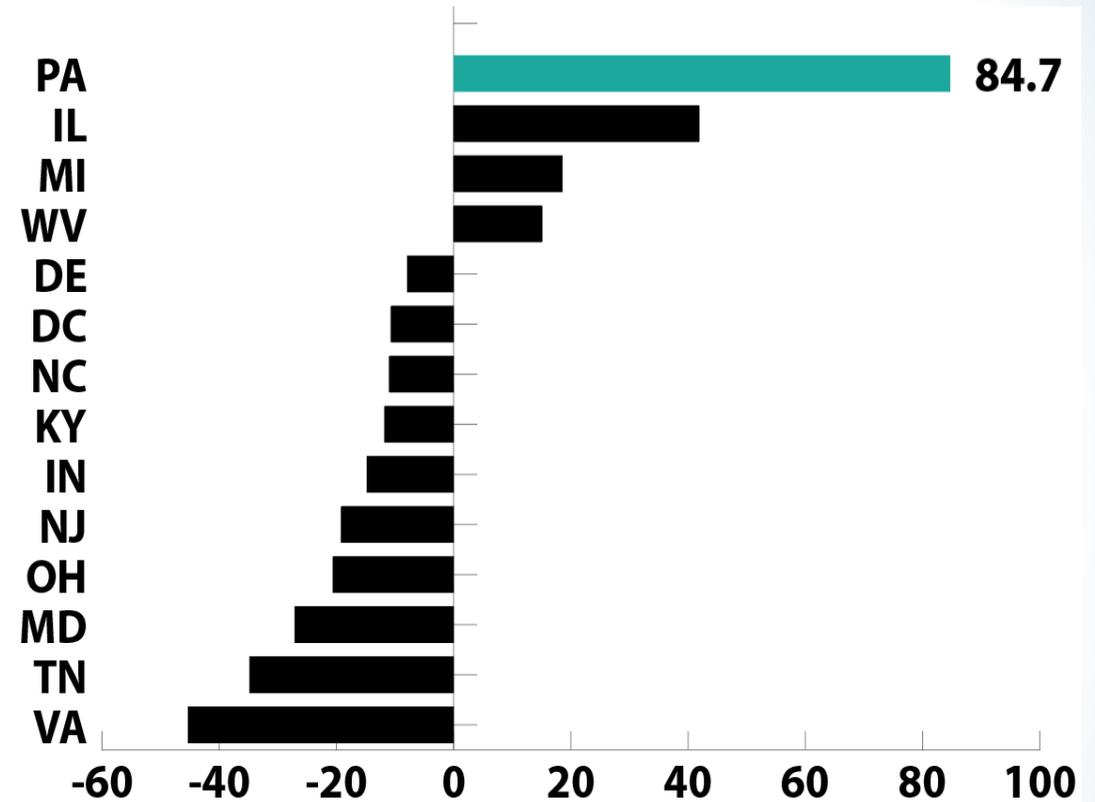
Projection of the Direct Impact on PA from All Phases of Currently Planned Data Center Development for 2027 through 2036

The Power Advantage

Abundance, Reliability, Affordability

Power at Scale

- PA as the **#1 electricity exporter** in the U.S. (85 million MWh in 2024), nearly double the next closest state.
- Powers not just PA — but the broader PJM region

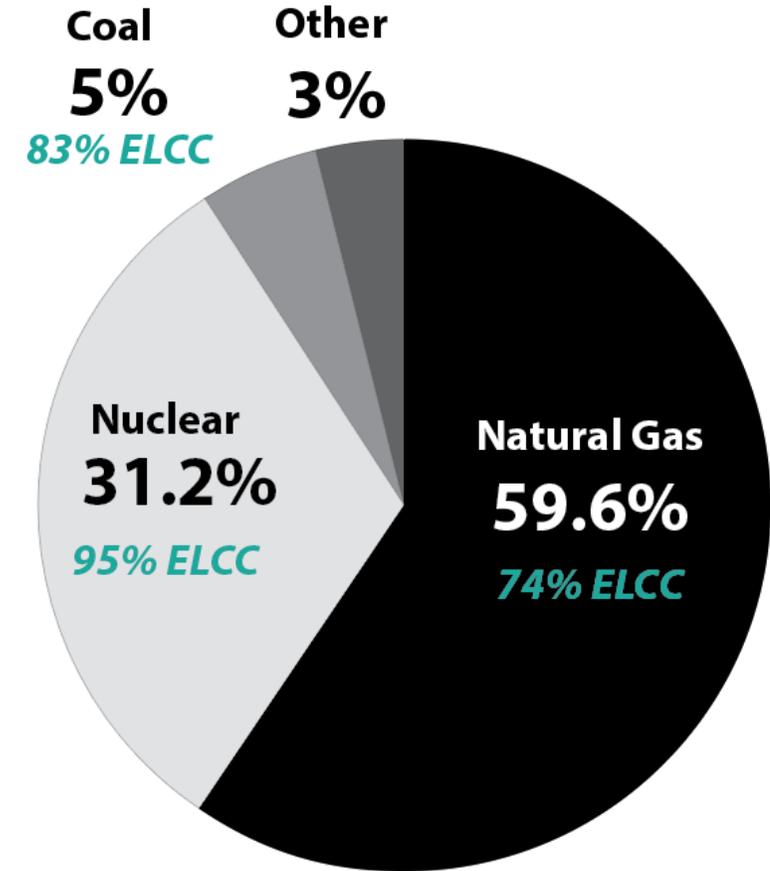


Net Interstate Trade of Electricity by State within PJM in 2024 (millions of megawatt hours)

The Power Advantage Abundance, Reliability, Affordability

Built for 24/7 Demand

- Data centers require constant, uninterrupted power
- PA's energy mix is **91% natural gas + nuclear**
- Provides stable, always-on baseload power

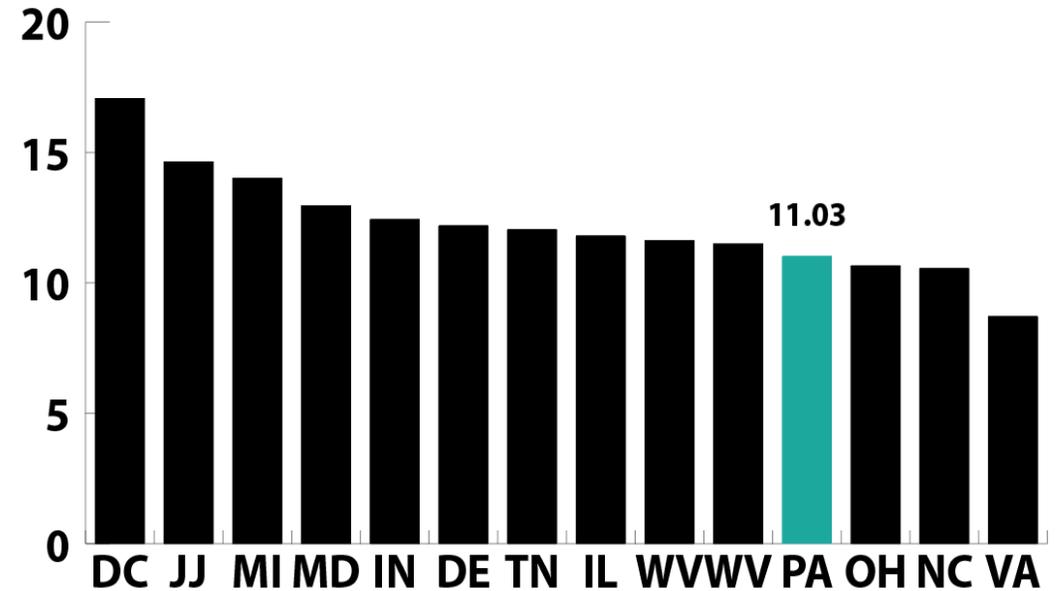


Electric Power Generation by Primary Source in Pennsylvania in 2024

The Power Advantage Abundance, Reliability, Affordability

A Competitive Cost

- PA ranks 4th lowest in commercial electricity costs (PJM)
- Lower power costs make Pennsylvania more competitive for data center investment

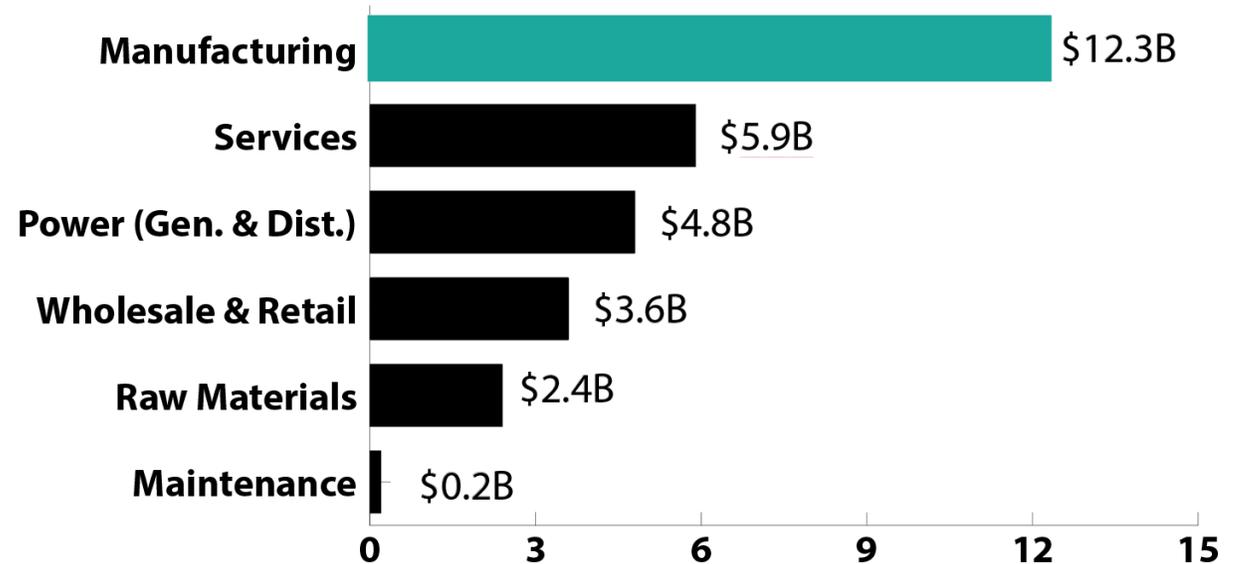


Average Commercial Electricity Rates by State within PJM in 2024 (cents per kilowatt-hour)

The Supply Chain – \$29 Billion "Made in PA"

PA doesn't just host data centers — it builds and supplies them

- PA leading all PJM states with **\$29.2 billion** in annual data center-related exports
- \$12.3 billion of these exports are manufactured goods

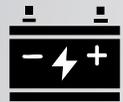


Pennsylvania Exports of Data Center Related Goods and Services to Data Center Hubs in PJM in 2024

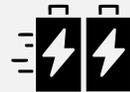
Built in Pennsylvania

Exporting from transformers to steel to cooling systems

Manufacturing



Power Suppliers



Grid Scale Batteries



Lumber



Transformers



Power Control Equipment



Raw Materials



Switchgear



Steel



Services

SW Pennsylvania: The Nation's Energy & Tech Manufacturing Hub

2024–2026 Headline Investments

Energy Manufacturing

\$86M Mitsubishi (MEPPI)

 *Beaver County — New Galilee*

New Advanced Switchgear Factory — circuit breakers for the national grid | 200 new jobs | Beat Ohio for the project

Grid Infrastructure

\$70M+ Hitachi Energy

 *Westmoreland County*

Expanding 3 facilities for high-voltage grid technology | 100+ new jobs | New EconiQ SF6-free switchgear line in Hunker & Mount Pleasant

Renewable Energy

\$100M GE Vernova

 *Charleroi and Pennsylvania*

FLEXINVERTER solar mfg line + switchgear factory expansion in Charleroi | 700 new jobs across PA facilities

AI & Photonics

\$2B Coherent Corp + NVIDIA

 *Saxonburg — Butler County*

NVIDIA invests \$2 billion into Pittsburgh-HQ'd photonics leader Coherent Corp. |

Battery Storage

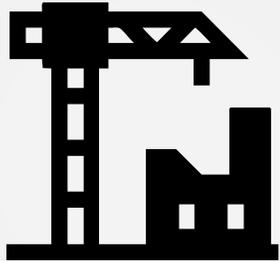
\$353M Eos Energy Enterprises

 *Allegheny County — HQ: PGH North Shore*

Relocating HQ from New Jersey to Nova Place | New 432,000 sq ft zinc battery manufacturing facility in Marshall Township | 735 new jobs | Partnering with CMU for AI & robotics

The Pennsylvania Advantage: Data Centers | Power | Manufacturing

Building & Operating



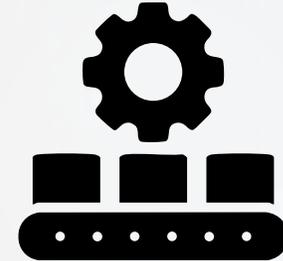
Construction today,
long-term operations

Powering Data Centers



Energy generation and
grid infrastructure

Manufacturing the Equipment



Build the components
behind every facility

This is a Pennsylvania Moment