



WHEN TRUST MATTERS

Hungry, Hungry, Hyperscalers

How large loads are redefining a predictable electric grid

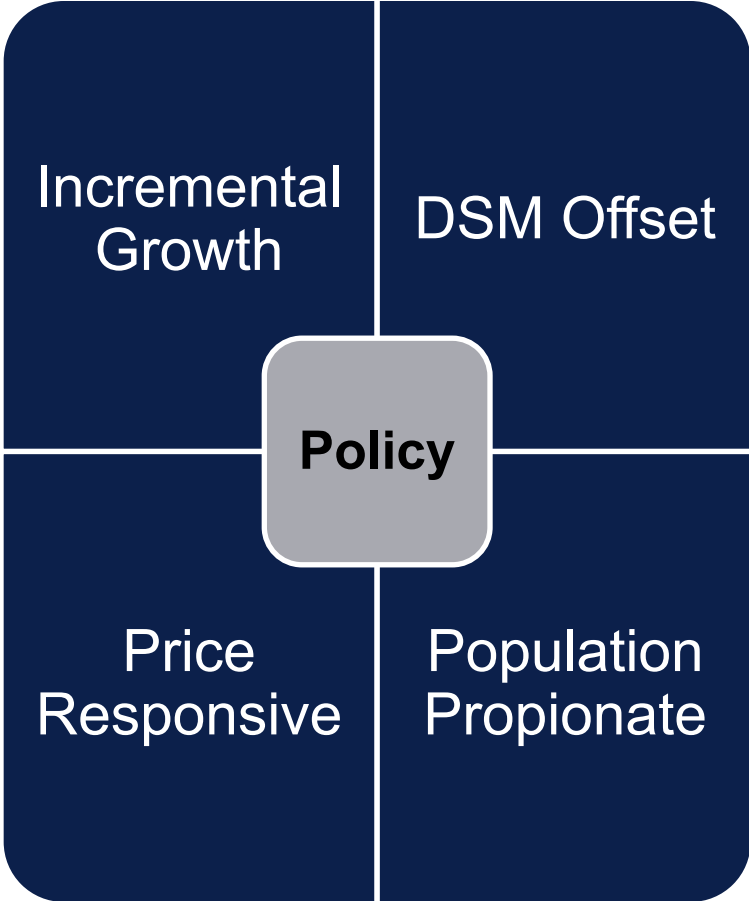
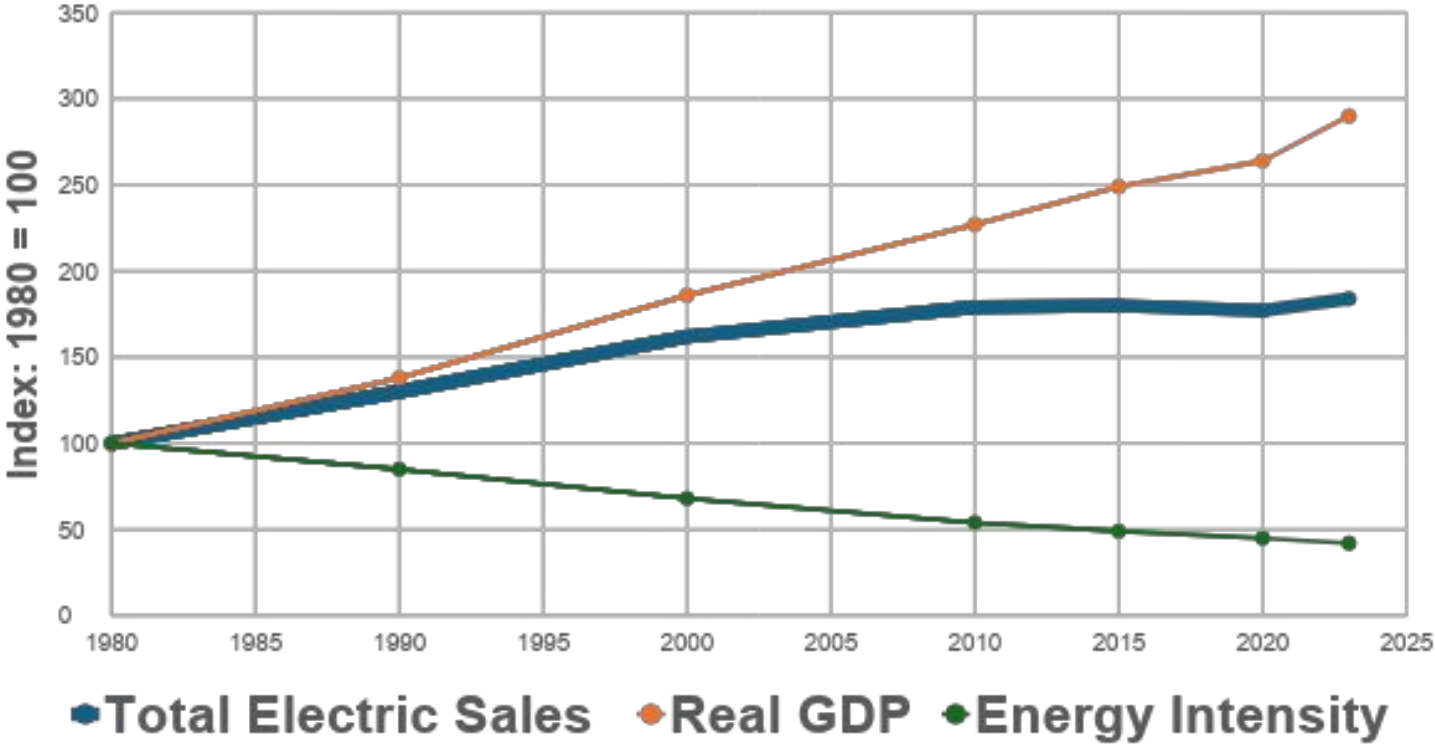
Wesly Whited – Principal Consultant
Author, DNV Energy Transition Outlook 2025 | loadtoruin.com

29 January 2026



The grid paradigm before inference

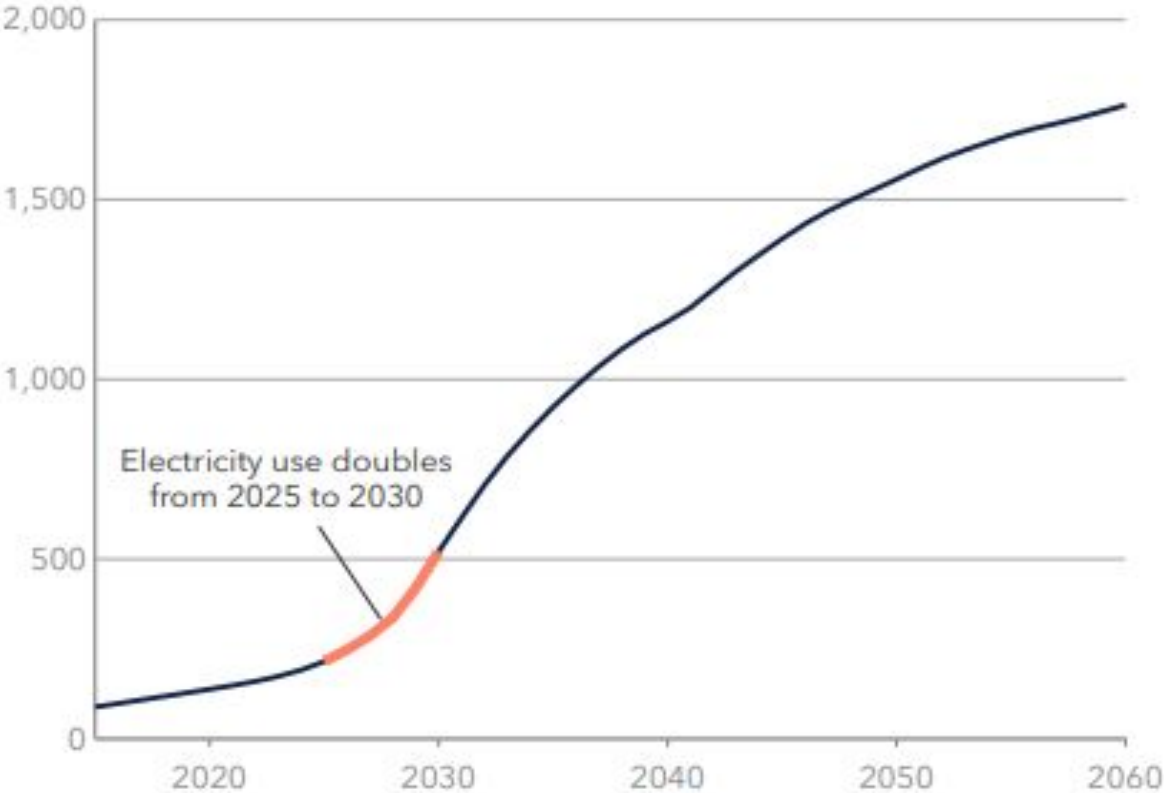
Efficiency Decoupled Growth from Electric Demand



Inference quadruples data center electric consumption

Data center electricity use accelerates through early 2030s

Data center electricity use (TWh/yr)



Source: 2025 DNV ETO

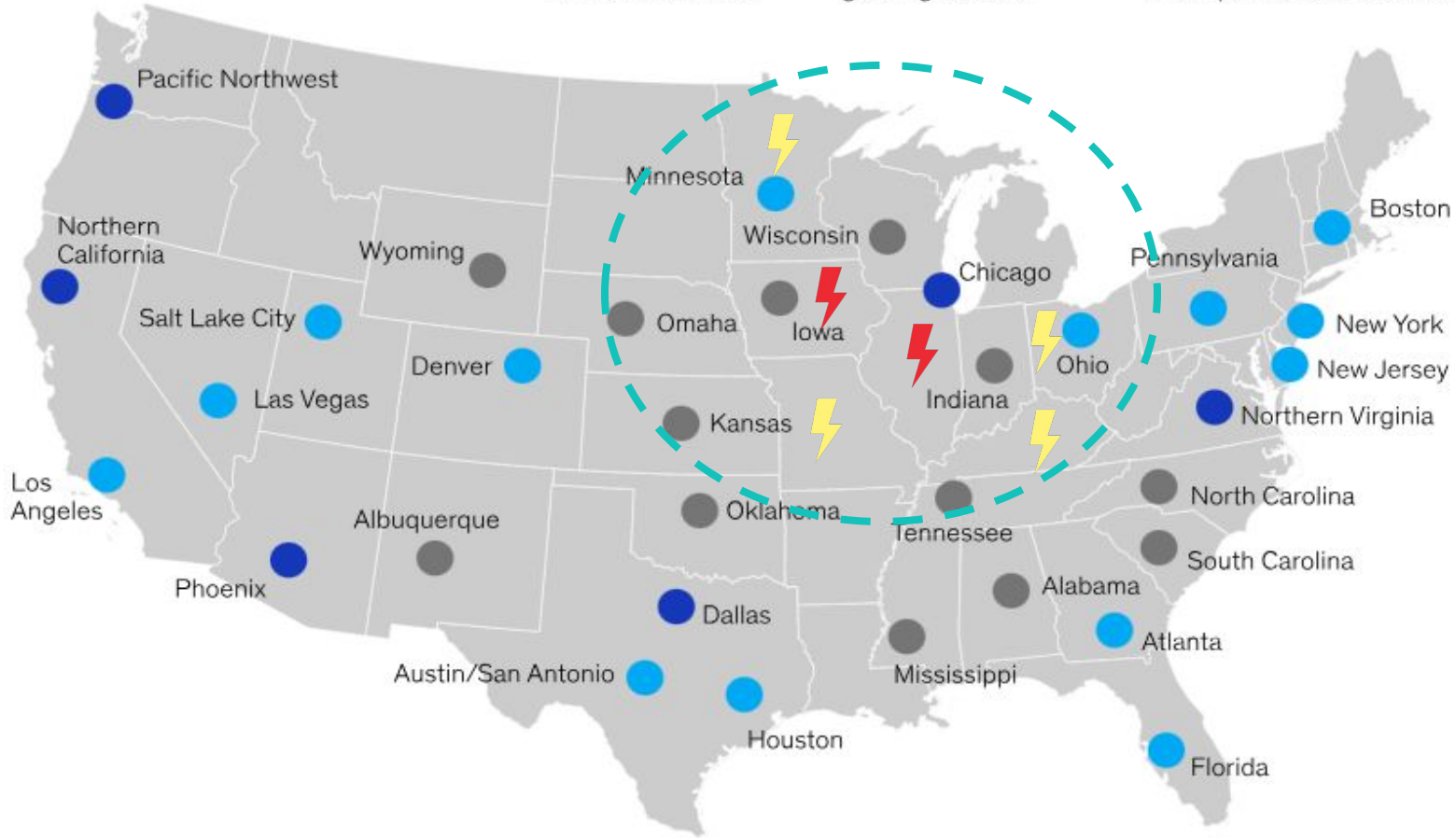
Data center load growth is ~4x total US EE savings

Source: 2024 EIA 861

Midwest DC load is growing

Data center presence in the continental US

- **Primary markets**
Existing demand of more than 800 MW¹
- **Secondary markets**
Lower but fast-growing demand
- **Emerging markets**
Emerging demand in markets where power is still abundant



Impact on statewide load

High Exposure

⚡ IA: 15% – 25%

⚡ IL: 7% – 13%

Moderate Exposure

⚡ OH: 2% – 4%

⚡ KY: 3% – 5%

⚡ MN/MO: ~1.5% – 3%

¹Megawatt.
Source: Datacenters.com; S&P Global Market Intelligence 451 Research; McKinsey Data Center Demand model

The data center “dartboard”: what states are trying



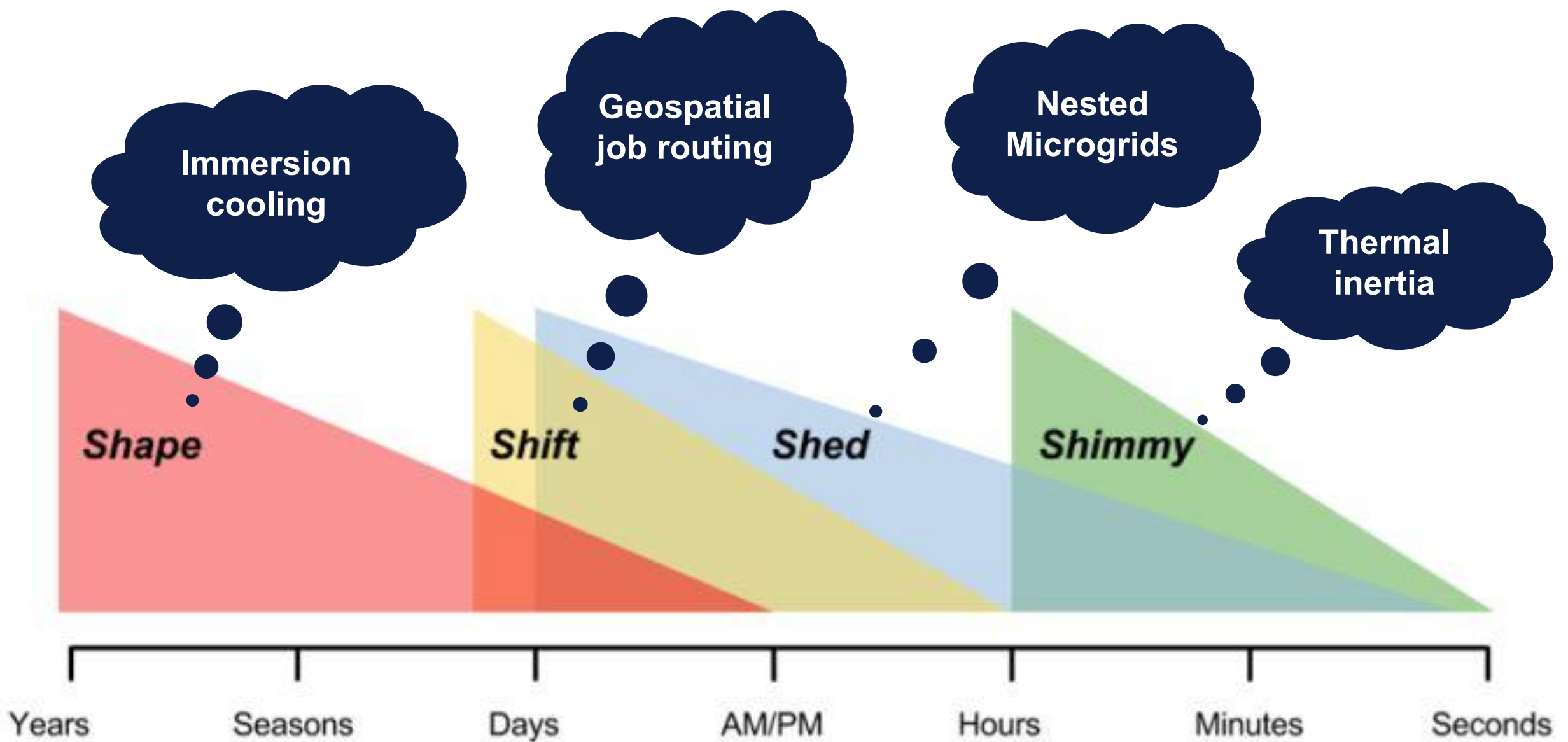
Supply Side
Location
Control



Demand Side
Load Shaping



Cost & Risk
Allocation



A Continuum of Controllability

Control follows contractual obligations; not technology



Bitcoin Miners

- Operator-owned workloads

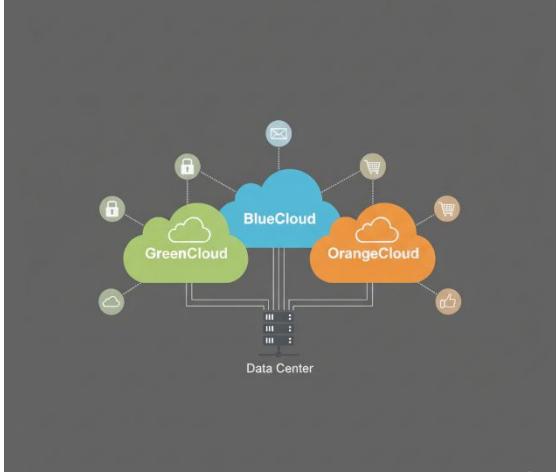
Dispatchable load



Colo/Edge

- Tenant-owned workloads

Price sensitivity \neq dispatchability



Mixed/Hybrid

- Shared workload control

Flexibility is episodic



Hyperscale

- Optimized for internal objectives;
- **NOT utility dispatchable**

NOT utility dispatchability

What does this mean for Monday morning?



Programs

Design intentional large load programs



Regulators

Require dispatchability assessments to interconnect



Planners

Model data center load as step-change; not trend extension

ETO



Blog



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