

Seeking Alpha, May 6, 2025

<https://seekingalpha.com/article/4782414-nuclear-bolsters-top-us-hyperscalers-clean-energy-portfolio-now-over-84-gw>

Nuclear Bolsters Top U.S. Hyperscalers' Clean Energy Portfolio, Now Over 84 GW

....

Balancing out power-intensive global operations and decarbonization commitments amid rapid, AI-fueled expansion, the top four US hyperscalers continue to drive the corporate-tied clean energy market, accounting for more than 61% of

....

Clean energy contracted by the top four US hyperscalers — Amazon, Google, Meta and Microsoft — makes up most of the total tracked for the technology and web services category, which itself accounts for bulk of US corporate procurement. Headquartered in the US but with operations worldwide, the group has secured carbon-free energy capacity across six continents, including at least 66% in North America. US-based power projects in deregulated states are favored, with a strong preference for solar

....

Nearly 27% of this US clean energy capacity is contracted with projects based in Texas, where the group operates 23 datacenters, and is developing and planning an additional 15 server-housing facilities

.... Contracted solar capacity dominates across the US footprint, accounting for 63% of the total. Wind is far behind, at 21%...

...

....

[Relevant listed:]

PBW	16.41	2.05%
Invesco WilderHill Clean Energy ETF		
PBD	11.18	-0.60%
Invesco Global Clean Energy ETF		