

Macro Roundup Article

Headline: [Data Centres Curbed as Pressure Grows On Electricity Grids](#)

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Tweet: Increased electrical demand from data centers is putting stress on electrical grids. Morgan Stanley forecasts that generative AI will drive 3/4 of data center power demand in 2027.

Summary: Energy use from data centers is growing rapidly in the US, home to a third of the world's 8,000 data centers, and in China, which has a tenth, according to the IEA. Globally, electricity consumption from data centres, cryptocurrencies, and artificial intelligence could double between 2022 and 2026, the IEA also said last month. Morgan Stanley analysts expect generative AI to drive more than three-quarters of global data center power demands in 2027, based on 2022 numbers.

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