QUARTERLY REPORT · 2026 Q3

US data-center construction spending rises 73% in a year

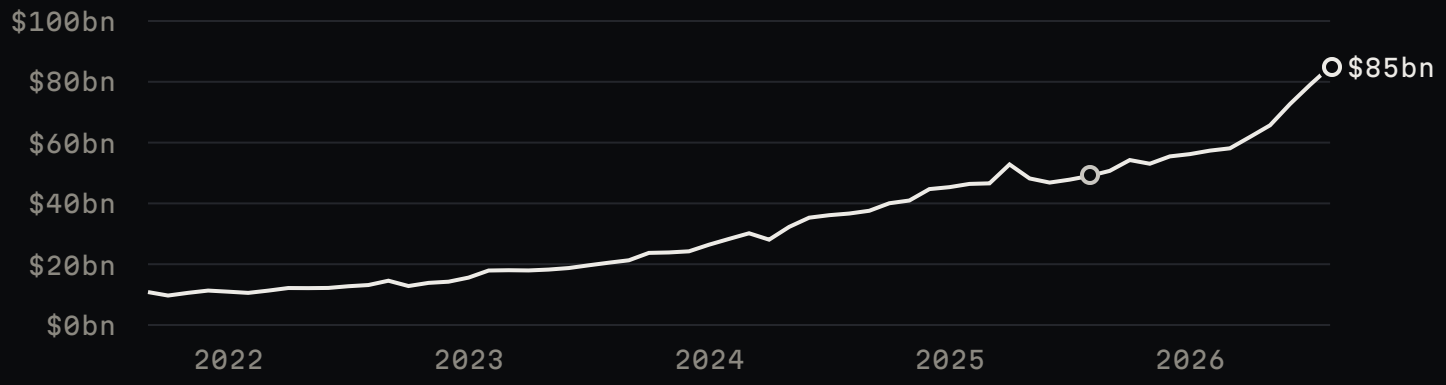
The AI buildout in the third quarter of 2026, in six findings. Each number comes from a dated release of this site's data, named under its chart. The report was fixed on 27 October 2026, and its figures and words do not change.

01	+73%	US data-center construction spending rises 73% in a year
02	+6.5%	US home power prices rise 6.5% in a year
03	+51%	TSMC's quarterly sales rise 51% in a year
04	+152,000	US employers add 152,000 jobs in the quarter
05	91 of 92	Anthropic leads the text arena on 91 of 92 days
06	72	AI platforms retire 72 model versions in the quarter

01 · BUILDOUT

US data-center construction spending rises 73% in a year

+73% August 2026 on a year earlier



$85.0 billion in August 2026 (preliminary), against $49.1 billion in August 2025, at a seasonally adjusted annual rate. August 2026 is the newest month in the quarter that the source has published. U.S. Census Bureau. Data as released here on 22 October 2026.

Read from series/2026-10-22.csv, sha256 490f258f0c4d · the whole history →

02 · POWER

US home power prices rise 6.5% in a year

+6.5% July 2026 on a year earlier



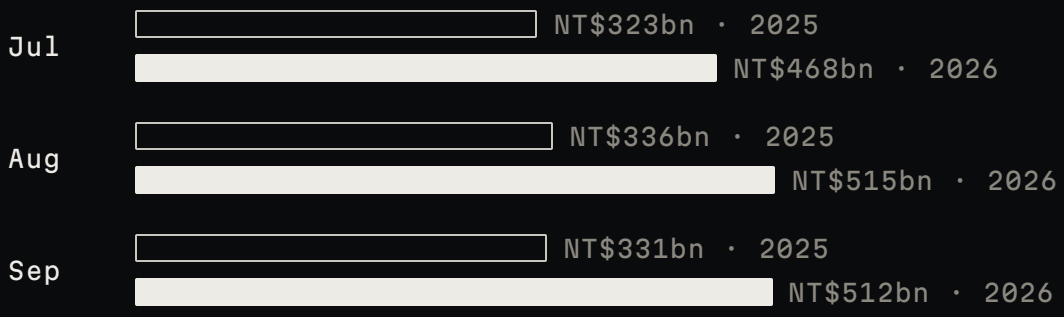
17.99¢ per kWh in July 2026, against 16.89¢ per kWh in July 2025, the average price over twelve months. July 2026 is the newest month in the quarter that the source has published. U.S. Energy Information Administration. Data as released here on 22 October 2026.

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03 · CHIPS

TSMC’s quarterly sales rise 51% in a year

+51% 2026 Q3 on a year earlier



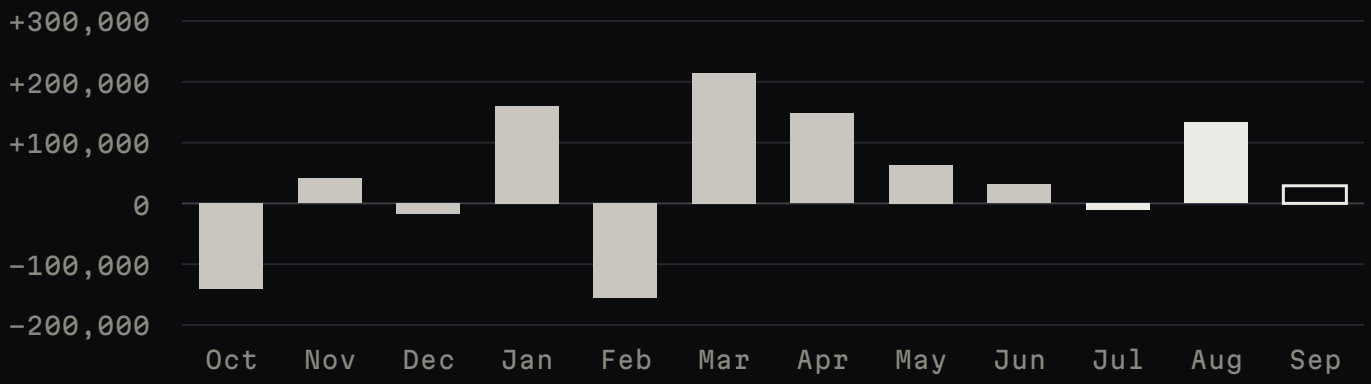
TSMC reported NT$1.49 trillion of sales for July to September 2026, against NT$0.99 trillion a year earlier, in its monthly filings to Taiwan’s Financial Supervisory Commission. Data as released here on 16 October 2026.

Read from machine/sales/2026-10-16.csv, sha256 29afa0a0efe7 · the whole history →

04 · JOBS

US employers add 152,000 jobs in the quarter

+152,000 payroll jobs, June 2026 to September 2026



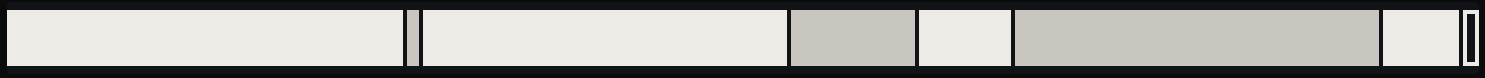
US payroll jobs went from 158,892,000 in June 2026 to 159,044,000 in September 2026, seasonally adjusted; September is preliminary. U.S. Bureau of Labor Statistics. Data as released here on 22 October 2026.

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05 · MODELS

Anthropic leads the text arena on 91 of 92 days

91 of 92 days Anthropic held first place



Jul Aug Sep

Anthropic other labs · each block is one model's days in first place

First place on LMArena's Text leaderboard changed hands 7 times in the quarter; days held by other labs: Google 1. LMArena, CC BY 4.0. Data as released here on 22 October 2026.

Read from frontier/reigns/2026-10-22.csv, sha256 50487993696e · the whole history →

06 · VENDORS

AI platforms retire 72 model versions in the quarter

72 model versions retired in 2026 Q3



Each retirement date that fell in the quarter, as 6 platforms' own deprecation pages gave it; the most: OpenAI 28, Azure AI Foundry 17 and Amazon Bedrock 11. Several platforms list other makers' models. Data as released here on 26 October 2026.

Read from frontier/retirements/2026-10-26.csv, sha256 50d3e9dc65df · the whole history →

Sources

- Buildout: U.S. Census Bureau (public domain), as this site released it on 22 October 2026: series.csv, release 2026-10-22, sha256 `490f258f0c4d`.
- Power: U.S. Energy Information Administration (public domain), as this site released it on 22 October 2026: series.csv, release 2026-10-22, sha256 `490f258f0c4d`.
- Chips: Taiwan FSC, via TWSE (OGDL 1.0), as this site released it on 16 October 2026: machine/sales.csv, release 2026-10-16, sha256 `29afa0a0efe7`.
- Jobs: U.S. Bureau of Labor Statistics (public domain), as this site released it on 22 October 2026: series.csv, release 2026-10-22, sha256 `490f258f0c4d`.
- Models: LMArena (CC BY 4.0), as this site released it on 22 October 2026: frontier/reigns.csv, release 2026-10-22, sha256 `50487993696e`.
- Vendors: each vendor's own deprecation page (facts, quoted, with a link to each page), as this site released it on 26 October 2026: frontier/retirements.csv, release 2026-10-26, sha256 `50d3e9dc65df`.