

Supply chains show signs of stability, but delays persist

UII FIELD REPORT 189 | DECEMBER 2025

SUMMARY

Data center operators reported fewer supply chain disruptions in 2025 than at any point in the past 5 years, although the level of impact still varies by region and market segment. Many operators continue to face delays in accessing critical equipment or advancing capital projects.

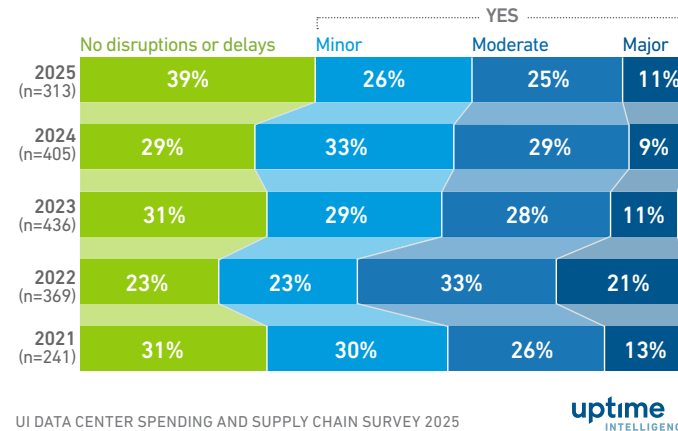
Results from the Uptime Institute Data Center Spending and Supply Chain Survey 2025 show that supply chains are steadily improving following the COVID-19 pandemic. However, delays remain a persistent challenge across much of the industry.

ABOUT THIS SURVEY

The Uptime Institute Data Center Spending and Supply Chain Survey 2025, conducted online in September and October 2025, had more than 400 data center owners and operators. This report highlights some of the findings.

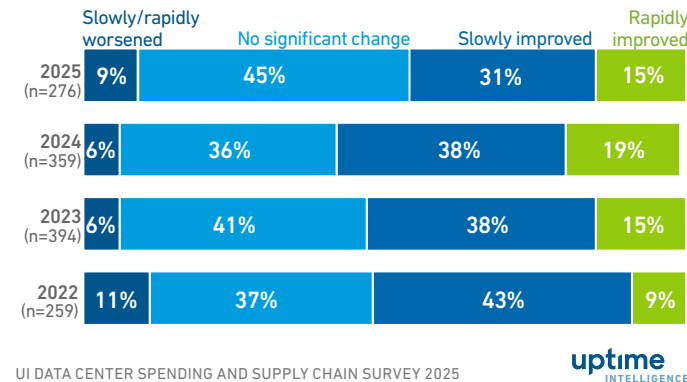
More operators report no supply chain disruptions in 2025

Have your organization's data center operations suffered supply chain disruptions or delays during the past 18 months?



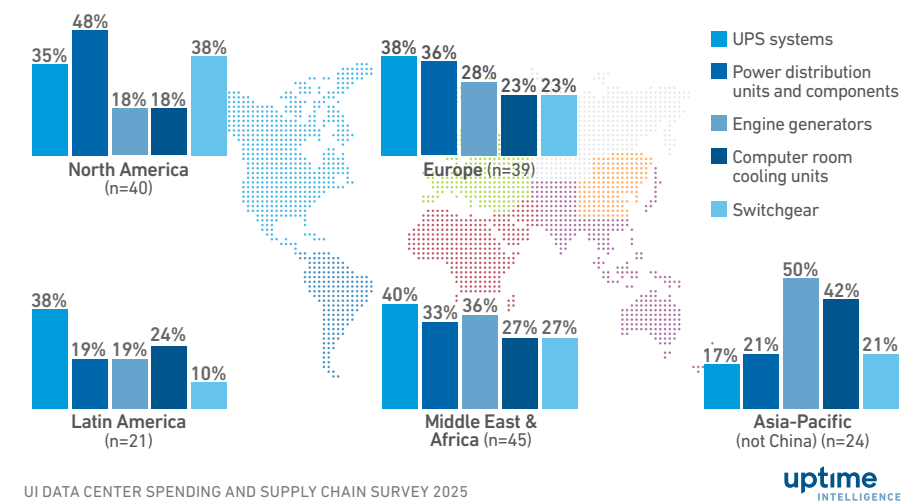
Fewer operators say overall supply chain experience is improving

Which of the following best describes your organization's overall data center supply chain experience over the past six months?



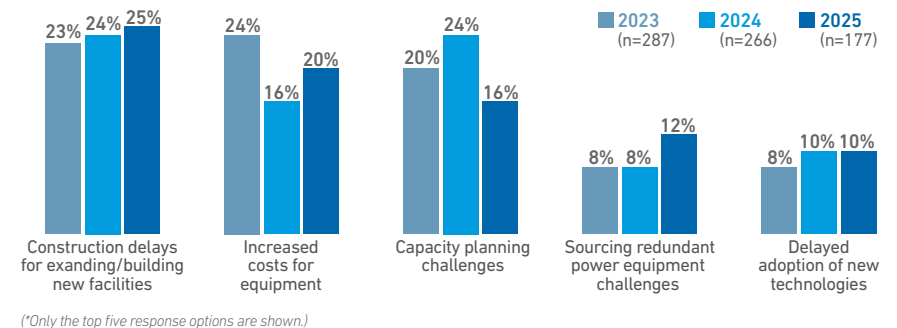
Affect of supply chain disruptions on equipment vary by region

Which of the following have been most affected by your organization's supply chain disruptions? Choose all that apply.



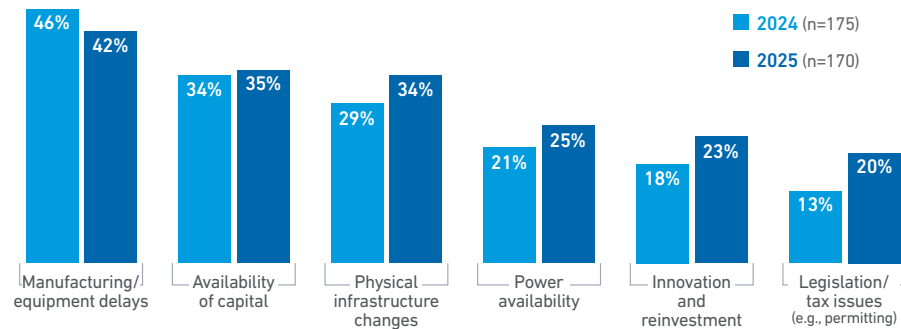
Capacity planning challenges ease, while others rise slightly

Which of the following has had the most significant impact on your organization as a result of supply chain disruptions?



Manufacturing issues remain the leading driver of project delays

Which of these factors (if any) have been driving data center capital project delays? Choose all that apply.



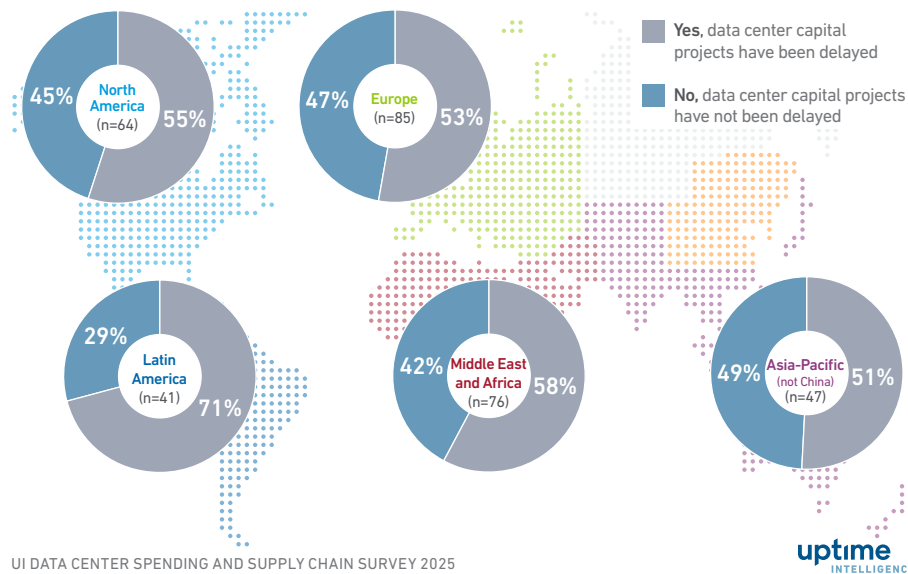
(*Only the top six response options are included.)

UI DATA CENTER SPENDING AND SUPPLY CHAIN SURVEY 2025

uptime
INTELLIGENCE

Latin American operators report the highest rate of project delays

Focusing on your data center capital projects over the past 12 months, have any of your organization's capital projects been delayed?

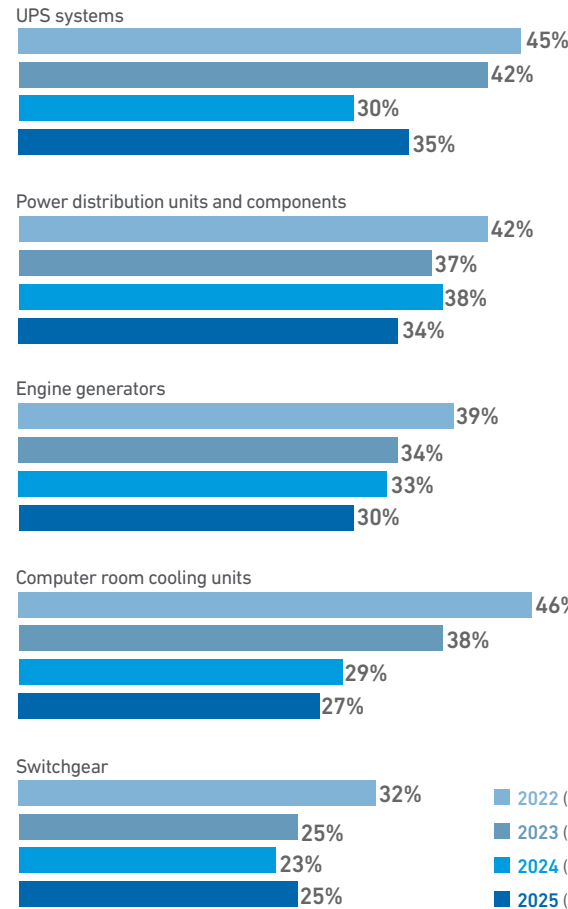


UI DATA CENTER SPENDING AND SUPPLY CHAIN SURVEY 2025

uptime
INTELLIGENCE

UPS supply chain strain increases as other impacts remain steady

Which of the following have been most affected by your organization's supply chain disruptions? Choose all that apply.



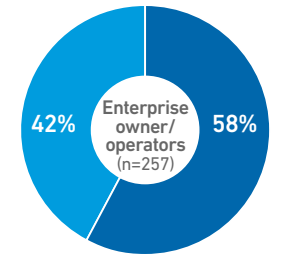
(*Only the top five response options are shown.)

UI DATA CENTER SPENDING AND SUPPLY CHAIN SURVEY 2025

uptime
INTELLIGENCE

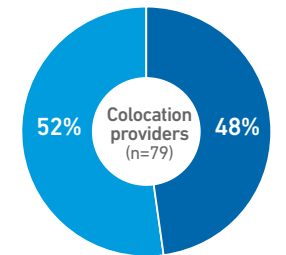
Enterprises report more project delays than colocation

Focusing on your data center capital projects, have any of your organization's capital projects been delayed over the past 12 months?



capital projects have been delayed

capital projects have not been delayed



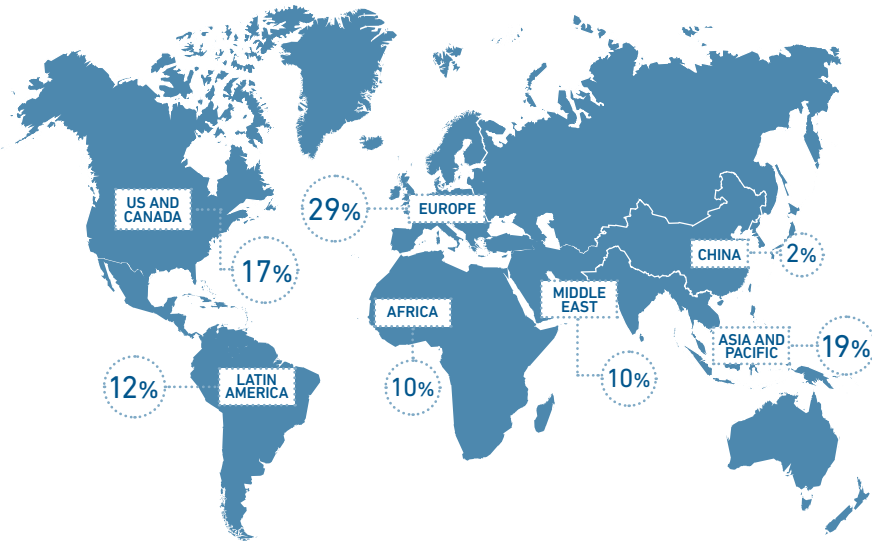
(*Responses for "Don't know" and respondents without capital projects are not included.)

UI DATA CENTER
SPENDING AND SUPPLY
CHAIN SURVEY 2025

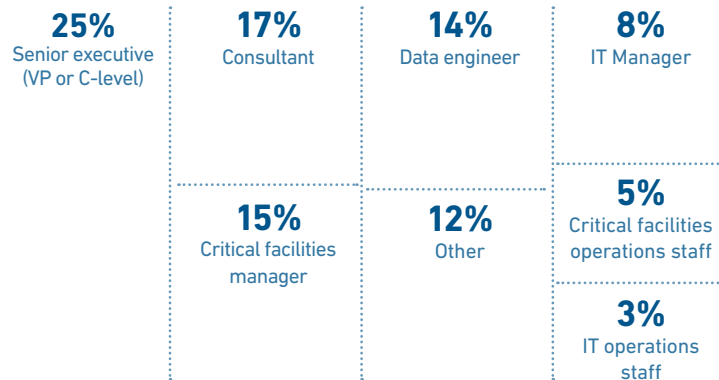
uptime
INTELLIGENCE

Demographics: Uptime Institute Data center spending and supply survey 2025

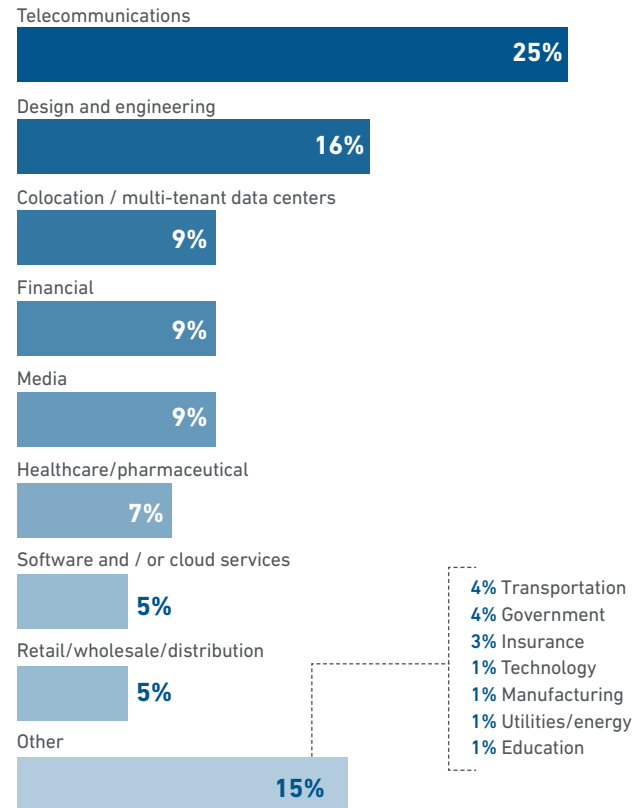
Company location (n=850)



Job description (n=630)



Verticals (n=629)



Authors

Douglas Donnellan, Research Analyst,
ddonnellan@uptimeinstitute.com

About Uptime Institute

Uptime Institute is the Global Digital Infrastructure Authority. Its Tier Standard is the IT industry's most trusted and adopted global standard for the proper design, construction, and operation of data centers – the backbone of the digital economy. For over 25 years, the company has served as the standard for data center reliability, sustainability, and efficiency, providing customers assurance that their digital infrastructure can perform at a level that is consistent with their business needs across a wide array of operating conditions.

With its data center Tier Standard & Certifications, Management & Operations reviews, broad range of related risk and performance assessments, and accredited educational curriculum completed by over 10,000 data center professionals, Uptime Institute has helped thousands of companies, in over 100 countries to optimize critical IT assets while managing costs, resources, and efficiency.

Uptime Institute is headquartered in New York, NY, with offices in Seattle, London, Sao Paulo, Dubai, Singapore, and Taipei. For more information, please visit www.uptimeinstitute.com

All general queries:

Uptime Institute
 405 Lexington Avenue,
 9th Floor, New York,
 NY 10174, USA
 +1 212 505 3030

info@uptimeinstitute.com