

Global HVAC Valve For Data Center Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on HVAC Valve For Data Center competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, global HVAC Valve For Data Center production capacity is 2 million units, with production volume reached approximately 1.2 million units, with an average global market price of around US\$ 190 per unit. The market gross margin is mainly 30%-40%. In this context, HVAC valves refer to professional-grade regulating, isolating, balancing, and controlling valves used in data center cooling systems (including chilled water, cooling water, CRAH/CRAC, in-row cooling, liquid cooling, etc.). These valves precisely manage fluid flow, pressure, and temperature to ensure stable, redundant, and energy-efficient server rack cooling. They typically feature high-precision regulation (0-10V/4-20mA/Modbus/BACnet), fast response, extremely low leakage, corrosion-resistant materials, high cycle life (millions+ cycles), and deep integration with BMS/BAS. They are key components for achieving PUE optimization, cold/hot aisle isolation management, dynamic heat dissipation control, and stable temperature control in data centers under high AI load scenarios. The upstream of the data center HVAC valve industry chain includes copper/stainless steel valve bodies, valve cores, seals (EPDM, PTFE), electric/intelligent actuators, flow/pressure sensors, control chips, and industrial communication modules. The midstream comprises valve manufacturers and system integrators, with core components involving the precision machining, assembly, calibration, and communication protocol integration of products such as ball valves, butterfly valves, PICVs, and control valves. The downstream mainly consists of data center cooling system providers (CRAH/CRAC manufacturers, modular data center manufacturers, liquid cooling system providers), EPC/electromechanical contractors, telecom operators (Hyperscale, Colocation), major internet companies, and

financial industry data centers. Demand is driven by the high reliability, high efficiency, and real-time regulation requirements of chilled water systems, cooling tower systems, terminal air conditioning systems (CRAH), and liquid cooling systems, placing higher demands on valve precision, lifespan, maintainability, and intelligence, forming a complete closed-loop industry chain from "materials ? valve body/actuator ? valve manufacturing ? BMS integration ? data center applications."The mainstream customers of data center HVAC valves are mainly concentrated in several core sectors, including hyperscale cloud providers, internet giants, colocation operators, financial and high-reliability industry data centers, and modular data center and liquid cooling system suppliers. These include Amazon AWS, Microsoft Azure, Google Cloud, Meta, Oracle, IBM Cloud, Equinix, Digital Realty, NTT Global Data Centers, Telehouse, Compass Datacenters, Switch, China Telecom, China Mobile, China Unicom, Alibaba Cloud, Tencent, Baidu, GDS, GDS Holdings, and GDS Holdings, as well as various financial data centers (bank core data centers, securities trading centers, clearing institutions) and high-reliability data centers of government agencies. Additionally, CRAH/CRAC vendors (such as Vertiv, Schneider Electric, Stulz, Airedale), liquid cooling companies (such as Submer, CoolIT, Invesco, and Inspur Liquid Cooling), and others... EPC/EMC general contractors (such as Cushman & Wakefield, Jones Lang LaSalle, and AECOM) are also key customer groups for valve procurement and integration, constituting the core demand side of global data center cooling systems. The market potential for HVAC valves in data centers is expanding rapidly, driven by the exponential growth of global computing demand, the shift toward high-density AI workloads, and the structural evolution from traditional CRAC-based cooling to highly dynamic chilled-water and liquid-cooling architectures. HVAC valves?covering control valves, PICVs, isolation valves, balancing valves, and intelligent actuated valves?serve as the fundamental flow-control elements that regulate chilled water and cooling water distribution, ensure stable supply?return temperature deltas, and maintain the precision thermal environment required by modern IT loads. As global data center white-space capacity expands at a CAGR of 10?15% and AI server deployment accelerates, demand for high-precision, fast-response and communication-integrated valves is expected to rise consistently across hyperscale, colocation and enterprise segments. A major source of market momentum comes from the transition toward high-density racks (20?80 kW standard, 100?500 kW for AI training clusters). These IT loads impose rapid thermal fluctuations and higher coolant flow requirements, necessitating precise modulation valves with low hysteresis, leakage-class VI sealing, and integrated differential-pressure sensing to maintain stable coil performance. This is pushing demand toward smart control valves and PICVs supporting 0?10V, 4?20 mA, Modbus and BACnet, enabling digital-twin-based control and predictive maintenance. As a result, the average valve content per MW of data-center cooling capacity is increasing, with chilled-water systems for

hyperscale campuses typically requiring thousands of valves across AHUs, CRAHs, modular chilled-water plants and secondary distribution loops. Large-scale projects in North America, Europe, and Asia increasingly specify intelligent valve platforms from leading vendors, reflecting a structural upgrade cycle that expands both unit volume and ASP. Another significant growth engine is the rise of liquid-cooling technologies, including cold plates, rear-door heat exchangers (RDHx), and immersion cooling. These technologies require compact, corrosion-resistant, high-cycle valves capable of precise flow balancing at the rack or CDU level. Liquid cooling introduces a new set of valve applications? rack-level flow control, CDU bypass valves, manifold valves? and substantially increases the number of valves per cabinet compared with airflow-based systems. As AI clusters continue to scale, liquid cooling is expected to grow from

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