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Global Data Center Plastic Pipes Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Plastic Pipes market size is expected to reach $ 448 million by 2032, rising at a market growth of 9.0% CAGR during the forecast period (2026-2032).

Data Center Plastic Pipes refer to thermoplastic piping systems specifically used for water, coolant and other fluid distribution within data center cooling infrastructure. These pipes are primarily manufactured from polypropylene (PP), polyethylene (PE), PVC/CPVC and other engineering polymers, and are used in Facility Water Systems (FWS), Technology Cooling Systems (TCS), CDU-to-rack distribution loops and associated cooling infrastructure. Compared with conventional metallic piping, polymer systems provide corrosion resistance, smooth internal surfaces, low weight and relatively low thermal conductivity, while fusion-welded or engineered joint systems can support high-reliability liquid-cooling architectures. GF, for example, specifically offers PP-H, PE100 and PVDF polymer piping for direct-to-chip liquid cooling and data center cooling infrastructure.

Key Findings

PP, PE and PVC-based systems represent the principal material categories in data center plastic piping

AI-driven liquid cooling is increasing demand for corrosion-resistant polymer coolant distribution systems

FWS, TCS and CDU-to-rack piping represent different levels of the data center cooling architecture

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Cloud and hyperscale data centers are important target applications for large-scale polymer piping systems

Market Trends

The market is shifting from conventional facility chilled-water piping toward more specialized liquid-cooling distribution networks. As rack power density rises, plastic piping is increasingly being considered not only for building-level FWS loops but also for TCS and CDU-to-rack distribution. Higher-purity PP-H and PVDF systems are gaining attention for direct-to-chip cooling because corrosion products and ionic contamination can affect cold plates and cooling components. Prefabricated pipe assemblies, fusion joining, leak monitoring and modular rack distribution are also becoming more important as data center construction moves toward standardized and rapidly deployable infrastructure. GF introduced polymer solutions specifically engineered for direct-to-chip coolant distribution, while AGRU now provides coordinated polymer systems across condenser water, FWS and TCS loops.

Market Dynamics

Drivers

The principal growth driver is the rapid expansion of AI and high-density computing, which is accelerating the transition from air cooling toward liquid cooling. Higher coolant flow requirements increase the importance of piping reliability, corrosion resistance and hydraulic performance. Polymer piping avoids internal metal corrosion and scaling and can reduce contamination in liquid-cooling loops. Lower weight and heat-fusion installation can also simplify large-scale data center construction and expansion.

Restraints

Plastic piping materials must be selected according to coolant chemistry, pressure, operating temperature, fire requirements and installation location. Different polymers have different mechanical and thermal limits, meaning PP, PE, PVC/CPVC and PVDF cannot be substituted directly in every section of a cooling system. Data center operators also place extremely high importance on leak prevention, making welding

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quality, joint inspection, pressure testing and installation standards critical barriers to adoption.

Opportunities

Direct-to-chip cooling provides the most important emerging opportunity because it creates additional coolant-distribution infrastructure between central or rack-level CDUs and server cold plates. Modular and prefabricated data centers also favor lightweight polymer piping because assemblies can be fabricated off-site and installed quickly. Large AI and hyperscale facilities create additional opportunities for large-diameter FWS and TCS headers as well as smaller CDU-to-rack distribution systems.

Challenges

The primary challenge is maintaining extremely high reliability in mission-critical environments. Material compatibility with treated water, glycol and specialized liquid-cooling fluids must be verified over long operating periods. Installation quality is equally important because leakage above high-value computing equipment can create substantial operational risks. Suppliers therefore increasingly compete through complete systems combining pipes, fittings, valves, prefabrication, engineering and leak-monitoring capabilities rather than through pipe products alone.

Industry Chain Analysis

The upstream industry primarily includes PP, PE, PVC/CPVC, PVDF and other polymer resins, reinforcement materials and additives. Midstream manufacturers produce pipes, fittings, manifolds, valves, double-containment systems and prefabricated piping assemblies. Downstream systems integrators and contractors install these products within FWS, TCS and CDU distribution networks, ultimately serving enterprise, cloud/hyperscale, edge and other data centers. As liquid cooling becomes more complex, engineering design, hydraulic calculation, prefabrication, welding quality assurance and leak detection are becoming increasingly important parts of the value chain.

Segment Insights

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By material, PP Pipes are particularly important in indoor cooling-water and technology-cooling applications because of their corrosion resistance, weldability and broad operating range. PP-R, PP-RCT and PP-H systems are already used in data center and supercomputer cooling projects. PE Pipes, particularly PE100 and PE100-RC, are suitable for larger headers, underground infrastructure and facility cooling loops because of their toughness and availability in larger diameters. PVC and CPVC Pipes are widely used in North American data center cooling and utility systems, with IPEX offering dedicated PVC/CPVC cooling-water systems. Other materials include PVDF and ABS, which address higher-purity or specific operating requirements.

Downstream Market Opportunities

Cloud & Hyperscale Data Centers represent an important target market because their large campuses require extensive cooling-water networks and are increasingly deploying high-density AI infrastructure. Enterprise Data Centers provide demand for retrofits and migration from traditional metal piping toward corrosion-resistant polymer systems, while Edge Data Centers create opportunities for compact and modular piping assemblies. Future growth will increasingly depend on liquid-cooled AI clusters rather than conventional low-density server rooms.

Regional Insights

North America and Europe currently have well-developed polymer piping supplier ecosystems and documented data center installations. North America has strong participation from IPEX, Asahi/America and Aquatherm, while European suppliers include GF, AGRU and SIMONA. Asia is becoming increasingly important as new AI and hyperscale infrastructure expands and polymer piping suppliers extend direct-liquid-cooling solutions into the region. Global suppliers are therefore strengthening engineering, prefabrication and local technical-support capabilities close to major data center construction markets.

Competitive Landscape Analysis

The Data Center Plastic Pipes market includes both specialized thermoplastic piping companies and diversified flow-control suppliers. Among the companies in the attachment, GF Piping Systems has one of the clearest dedicated data center portfolios,

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covering PP-H, PE and PVDF as well as direct-to-chip and CDU-to-rack distribution systems. AGRU provides PE, PP and PVDF solutions across condenser water, FWS and TCS infrastructure. Aquatherm has a strong installed base of PP-R/PP-RCT cooling pipes in data centers and supercomputer facilities, while IPEX provides PVC, CPVC and ABS systems specifically for data center cooling. Asahi/America offers PE, PP, PVC/CPVC and double-containment thermoplastic systems, and SIMONA provides PP-H, PE100 and PVDF solutions for liquid-cooling infrastructure. Other companies in the attachment, including Aliaxis, Pipelife, Watts, NIBCO, China Lesso and regional pipe manufacturers, participate through broader plastic piping and fluid-distribution portfolios, while the strongest differentiation in this market increasingly comes from dedicated data center engineering, fusion technology, prefabrication, system purity and leak-management capabilities.

Report Scope

This report studies the global Data Center Plastic Pipes production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Plastic Pipes and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Data Center Plastic Pipes that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Plastic Pipes total production and demand, 2021-2032, (K Meter)

Global Data Center Plastic Pipes total production value, 2021-2032, (USD Million)

Global Data Center Plastic Pipes production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Meter), (based on production site)

Global Data Center Plastic Pipes consumption by region & country, CAGR, 2021-2032 & (K Meter)

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U.S. VS China: Data Center Plastic Pipes domestic production, consumption, key domestic manufacturers and share

Global Data Center Plastic Pipes production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Meter)

Global Data Center Plastic Pipes production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

Global Data Center Plastic Pipes production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

This report profiles key players in the global Data Center Plastic Pipes market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include GF Piping, AGRU, Watts, IPEX, Aquatherm GmbH, POLYMELT Pipe Systems GmbH, ISCO Industries, KPS Piping Systems, Aliaxis, Asahi/America, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Data Center Plastic Pipes market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Meter) and average price (US$/Meter) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Data Center Plastic Pipes Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Data Center Plastic Pipes Market, Segmentation by Type:

PP Pipes

PE Pipes

PVC Pipes

Other

Global Data Center Plastic Pipes Market, Segmentation by Piping Function:

Facility Water System (FWS) Pipe

Technology Cooling System (TCS) Pipe

CDU-to-Rack Distribution Pipe

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Others

Global Data Center Plastic Pipes Market, Segmentation by Application:

Enterprise Data Centers

Cloud & Hyperscale Data Centers

Edge Data Centers

Others

Companies Profiled:

GF Piping

AGRU

Watts

IPEX

Aquatherm GmbH

POLYMELT Pipe Systems GmbH

ISCO Industries

KPS Piping Systems

Aliaxis

Asahi/America

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SIMONA

NIBCO

Pipelife

Liansu Technology

Zhongtong pipe

Key Questions Answered

1. How big is the global Data Center Plastic Pipes market?
2. What is the demand of the global Data Center Plastic Pipes market?
3. What is the year over year growth of the global Data Center Plastic Pipes market?
4. What is the total value of the global Data Center Plastic Pipes market?
5. Who are the Major Players in the global Data Center Plastic Pipes market?
6. What are the growth factors driving the market demand?

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