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# Global Data Center Plastic Pipes Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Data Center Plastic Pipes market size was valued at US$ 214 million in 2025 and is forecast to a readjusted size of US$ 448 million by 2032 with a CAGR of 9.0% during review period.

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

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

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

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cannot be substituted directly in every section of a cooling system. Data center operators also place extremely high importance on leak prevention, making welding 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.

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## Segment Insights

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

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companies and diversified flow-control suppliers. Among the companies in the attachment, GF Piping Systems has one of the clearest dedicated data center portfolios, 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 is a detailed and comprehensive analysis for global Data Center Plastic Pipes market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global Data Center Plastic Pipes market size and forecasts, in consumption value ($ Million), sales quantity (K Meter), and average selling prices (US$/Meter), 2021-2032

Global Data Center Plastic Pipes market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Meter), and average selling prices (US$/Meter), 2021-2032

Global Data Center Plastic Pipes market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (K Meter), and average selling prices (US$/Meter), 2021-2032

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Global Data Center Plastic Pipes market shares of main players, shipments in revenue ($ Million), sales quantity (K Meter), and ASP (US$/Meter), 2021-2026

## The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Data Center Plastic Pipes

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Data Center Plastic Pipes market based on the following parameters - company overview, sales quantity, revenue, 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.

Data Center Plastic Pipes market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## Market Segmentation

### Market segment by Type

PP Pipes

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PE Pipes

PVC Pipes

Other

## Market segment by Piping Function

Facility Water System (FWS) Pipe

Technology Cooling System (TCS) Pipe

CDU-to-Rack Distribution Pipe

Others

## Market segment by Application

Enterprise Data Centers

Cloud & Hyperscale Data Centers

Edge Data Centers

Others

## Major players covered

GF Piping

AGRU

Watts

IPEX

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Aquatherm GmbH

POLYMELT Pipe Systems GmbH

ISCO Industries

KPS Piping Systems

Aliaxis

Asahi/America

SIMONA

NIBCO

Pipelife

Liansu Technology

Zhongtong pipe

## Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

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## Chapter Outline

Chapter 1, to describe Data Center Plastic Pipes product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of Data Center Plastic Pipes, with price, sales quantity, revenue, and global market share of Data Center Plastic Pipes from 2021 to 2026.
Chapter 3, the Data Center Plastic Pipes competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.
Chapter 4, the Data Center Plastic Pipes breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.
Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.
Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Data Center Plastic Pipes market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.
Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.
Chapter 13, the key raw materials and key suppliers, and industry chain of Data Center Plastic Pipes.
Chapter 14 and 15, to describe Data Center Plastic Pipes sales channel, distributors, customers, research findings and conclusion.

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