

Global Hydronic Balancing Valves for Data Center Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GA0A9D5406DBEN.html>

Date: August 2026

Pages: 173

Price: US\$ 4,480.00 (Single User License)

ID: GA0A9D5406DBEN

Abstracts

The global Hydronic Balancing Valves for Data Center market size is expected to reach \$ 258 million by 2032, rising at a market growth of 15.5% CAGR during the forecast period (2026-2032).

In 2025, global Hydronic Balancing Valves for Data Center production reached approximately 536,000 units with average price of 151 USD/Unit.

Hydronic balancing valves for data centers are flow-regulating and hydraulic-control devices installed in chilled-water, condenser-water and liquid-cooling circuits. They maintain the required design flow across individual branches, cooling units and thermal zones, preventing excessive flow in hydraulically favored circuits, insufficient flow in remote circuits and unstable differential pressure. The product category includes manual balancing valves, automatic flow-limiting valves, differential-pressure control valves, pressure-independent balancing and control valves, and electronic smart valves integrating flow measurement, temperature sensing, thermal-energy monitoring and digital communication. Typical installation points include chiller plants, main supply and return headers, CRAH units, in-row cooling equipment, rear-door heat exchangers, coolant distribution units and direct-liquid-cooling loops. Compared with conventional commercial HVAC applications, data-center products place greater emphasis on continuous operating reliability, low leakage, rapid response, stable partial-load performance and integration with building or data-center infrastructure management systems.

Upstream participants supply valve-body materials such as brass, ductile iron, stainless steel and engineering plastics, together with valve trims, springs, diaphragms, seals, flow sensors, temperature sensors, electric actuators, control chips and communication

modules. Midstream manufacturers undertake hydraulic design, precision machining, assembly, flow calibration, pressure testing, control-algorithm development and valve-actuator integration. They may also provide prefabricated valve trains, energy valves and packaged components for coolant distribution units. Downstream participants include chiller and precision-cooling equipment manufacturers, CDU and liquid-cooling system integrators, mechanical and electrical contractors, HVAC engineering consultants and valve distributors. End users include hyperscale cloud facilities, colocation centers, enterprise data centers, edge facilities, and AI or high-performance computing centers. Products are generally specified during system design and subsequently pass through OEM integration, project installation, hydronic commissioning, acceptance testing and lifecycle maintenance. Global service coverage, commissioning expertise and compatibility with digital management platforms represent important competitive barriers.

The market for data-center hydronic balancing valves will be supported by the expansion of AI computing capacity, increasing rack power density, wider liquid-cooling adoption, refurbishment of existing facilities and stronger efficiency requirements. High-density computing is driving cooling architecture from predominantly room-level air cooling toward hybrid air-liquid systems, direct-to-chip cold plates and rack-level water cooling. As a result, valve applications are expanding from conventional chiller plants and terminal cooling units to CDUs, rack branches and server-level cooling loops.

Pressure-independent balancing and control valves, electronic flow-control valves and intelligent energy valves are expected to grow faster than conventional manual balancing products. Data-center thermal loads vary rapidly, facilities are frequently expanded in phases, and operators increasingly require continuous measurement of flow, temperature differential, cooling capacity and equipment status. Products offering digital communication, remote setting, diagnostics, energy metering and connection with data-center management platforms are therefore likely to achieve higher project penetration and unit value. Prefabricated and modular valve trains will also benefit from demand for faster deployment, standardized installation and reduced on-site commissioning time.

AI and high-performance computing facilities represent the application segment with the strongest growth potential, while hyperscale and colocation data centers provide the largest underlying demand base. Competition is shifting from individual valve performance toward complete hydronic-control solutions, integrated sensors and actuators, software connectivity and lifecycle services. Market development may nevertheless be constrained by fluctuations in data-center construction cycles, the

absence of a fully standardized liquid-cooling architecture, coolant-material compatibility requirements, leakage concerns and exceptionally strict reliability expectations. Suppliers with proven data-center references, international certifications, local technical support and comprehensive smart-valve portfolios are consequently expected to hold stronger competitive positions.

Report Scope

This report studies the global Hydronic Balancing Valves for Data Center production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hydronic Balancing Valves for Data Center 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 Hydronic Balancing Valves for Data Center that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hydronic Balancing Valves for Data Center total production and demand, 2021-2032, (K Units)

Global Hydronic Balancing Valves for Data Center total production value, 2021-2032, (USD Million)

Global Hydronic Balancing Valves for Data Center production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Hydronic Balancing Valves for Data Center consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Hydronic Balancing Valves for Data Center domestic production, consumption, key domestic manufacturers and share

Global Hydronic Balancing Valves for Data Center production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Hydronic Balancing Valves for Data Center production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Hydronic Balancing Valves for Data Center production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Hydronic Balancing Valves for Data Center 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 Belimo, IMI Hydronic Engineering / IMI Climate Control, Siemens, Danfoss, Schneider Electric, FlowCon International, Oventrop, Vexve / Frese, Johnson Controls, Honeywell, 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 Hydronic Balancing Valves for Data Center market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) 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 Hydronic Balancing Valves for Data Center Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hydronic Balancing Valves for Data Center Market, Segmentation by Type:

Static Balancing Valve

Dynamic Balancing Valve

PICV

Global Hydronic Balancing Valves for Data Center Market, Segmentation by Function:

Basic Electronic Balancing Valves

Communicating Balancing Valves

IoT-Enabled Smart Balancing Valves

Global Hydronic Balancing Valves for Data Center Market, Segmentation by Location:

Terminal Unit Balancing Valves

Branch Balancing Valves

Riser Balancing Valves

Plant Room and Main Loop Balancing Valves

Others

Global Hydronic Balancing Valves for Data Center Market, Segmentation by Application:

Hyperscale and Cloud Data Centers

Colocation Data Centers

Enterprise Data Centers

Edge and Modular Data Centers

High-Performance Computing and AI Data Centers

Others

Companies Profiled:

Belimo

IMI Hydronic Engineering / IMI Climate Control

Siemens

Danfoss

Schneider Electric

FlowCon International

Oventrop

Vexve / Frese

Johnson Controls

Honeywell

SAUTER

Xylem / Bell & Gossett

Nexus Valve

Armstrong Fluid Technology

KSB

Giacomini

HERZ Armaturen

Azbil Corporation

Zhejiang Dun'an Artificial Environment Co., Ltd.

Shanghai Karon Eco-Valve Manufacturing Co., Ltd.

Taidel IoT (Liaoning) Co., Ltd.

Sinro Air-conditioning Group Co., Ltd.

WOFK (Shanghai) Valve Co., Ltd.

Key Questions Answered:

1. How big is the global Hydronic Balancing Valves for Data Center market?
2. What is the demand of the global Hydronic Balancing Valves for Data Center market?
3. What is the year over year growth of the global Hydronic Balancing Valves for Data Center market?
4. What is the production and production value of the global Hydronic Balancing Valves for Data Center market?
5. Who are the key producers in the global Hydronic Balancing Valves for Data Center market?
6. What are the growth factors driving the market demand?

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