

Global Data Center PICV Market Growth 2026-2032

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Abstracts

The global Data Center PICV market size is predicted to grow from US\$ 123 million in 2025 to US\$ 560 million in 2032; it is expected to grow at a CAGR of 22.4% from 2026 to 2032.

In 2025, global Data Center PICV production reached approximately 609,000 units with average price of 205USD per unit.

PICV, short for Pressure Independent Control Valve, is a specialized hydraulic control valve adapted for data center water-cooled HVAC systems. It integrates dynamic differential pressure balancing, precise flow regulation, and electric control functions. This valve automatically offsets the impact of pipeline differential pressure fluctuations, stabilizing water flow to terminal air conditioning, in-row cooling, and liquid cooling equipment, eliminating the drawbacks of traditional valves requiring repeated manual adjustments and balancing. Addressing the dynamic fluctuations in data center loads and the high heat dissipation demands of high-density computing equipment, PICV enables precise control of the cooling loop, ensuring stable room temperature and balanced heat exchange efficiency. Compared to the traditional combination of a two-way valve and a static balancing valve, its structure is more streamlined, and the piping layout is simpler, effectively reducing system energy consumption and simplifying installation, construction, and subsequent maintenance processes. It is a core fluid control component for data center low-carbon energy saving and optimized PUE (Power Usage Effectiveness) indicators.

The data center PICV industry chain encompasses three core segments: upstream raw materials and core components, midstream equipment manufacturing and assembly, and downstream application scenarios. The upstream sector mainly includes valve body substrates, sealing components, electric actuators, intelligent control modules, and sensing accessories, involving supporting industries such as metal materials, special

rubber and plastics, and industrial automation components. Overseas companies have deep technological accumulation in the core control component field, while domestic manufacturers are continuously promoting self-developed technology and domestic substitution. The midstream sector is the professional manufacturing link of PICV, including valve precision machining, integration and assembly, performance testing, and customized R&D. It includes both global comprehensive HVAC valve companies and domestic brands specializing in fluid control, focusing on product design optimized for data center specific operating conditions. The downstream sector targets data center construction projects, electromechanical integration general contracting, refrigeration system service providers, and post-operation and maintenance companies, covering scenarios such as new supercomputing centers, AI computing power rooms, and energy-saving renovation of old data centers. Relying on computing infrastructure construction, a complete supply and demand matching system is formed.

Driven by the rapid development of artificial intelligence computing power, high-density and high-power consumption computer rooms have become mainstream, and the demand for cooling system upgrading in data centers continues to expand, bringing long-term growth momentum to the PICV market. Global low-carbon policies and strict energy consumption supervision have prompted the whole industry to optimize data center energy efficiency, which steadily boosts the penetration of high-efficiency hydraulic control valves. Traditional extensive water cooling systems cannot meet the energy-saving demands of modern computing rooms. With the core advantages of adaptive pressure stabilization, intelligent adjustment and low energy consumption, PICV has gradually become the standard configuration for water cooling systems of new data centers. In terms of market competition, international brands dominate the high-end market, while domestic enterprises accelerate import substitution with cost advantages, localized services and customized capabilities. Benefiting from technological upgrading and the popularization of liquid cooling, the application scope of PICV will be further expanded, with strong long-term development potential.

LP Information, Inc. (LPI) ' newest research report, the 'Data Center PICV Industry Forecast' looks at past sales and reviews total world Data Center PICV sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center PICV sales for 2026 through 2032. With Data Center PICV sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Data Center PICV industry.

This Insight Report provides a comprehensive analysis of the global Data Center PICV landscape and highlights key trends related to product segmentation, company

formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Data Center PICV portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center PICV market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center PICV and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Data Center PICV.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center PICV market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Threaded PICV

Flanged PICV

Grooved PICV

Welded PICV

Segmentation by Control:

Mechanical Self-Acting PICV

Motorized Modulating PICV

Smart / Communicating PICV

Segmentation by Application Location:

Terminal Unit PICV

CRAH / CRAC PICV

AHU PICV

Heat Exchanger / CDU Branch PICV

Segmentation by Application:

Enterprise Data Center

Communication Data Center

AI Data Center

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Belimo (CH)

Danfoss (DK)

Siemens (DE)

Frese (DK)

IMI Hydronic / IMI TA (SE)

FlowCon (DK)

Honeywell (US)

Johnson Controls (US)

Oventrop (DE)

Caleffi (IT)

Resideo (US)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center PICV market?

What factors are driving Data Center PICV market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Data Center PICV market opportunities vary by end market size?

How does Data Center PICV break out by Type, by Application?

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