

Global Data Center Plastic Pipes Market Growth 2026-2032

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Abstracts

The global Data Center Plastic Pipes market size is predicted to grow from US\$ 203 million in 2025 to US\$ 440 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 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

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 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

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, 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

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

This Insight Report provides a comprehensive analysis of the global Data Center Plastic Pipes 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 Plastic Pipes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Plastic Pipes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Plastic Pipes 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 Plastic Pipes.

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

Market Segmentation

Segmentation by Type:

PP Pipes

PE Pipes

PVC Pipes

Other

Segmentation by Piping Function:

Facility Water System (FWS) Pipe

Technology Cooling System (TCS) Pipe

CDU-to-Rack Distribution Pipe

Others

Segmentation by Application:

Enterprise Data Centers

Cloud & Hyperscale Data Centers

Edge Data Centers

Others

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.

GF Piping

AGRU

Watts

IPEX

Aquatherm GmbH

POLYMELT Pipe Systems GmbH

ISCO Industries

KPS Piping Systems

Aliaxis

Asahi/America

SIMONA

NIBCO

Pipelife

Liansu Technology

Zhongtong pipe

Key Questions Addressed in this Report

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

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

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

How do Data Center Plastic Pipes market opportunities vary by end market size?

How does Data Center Plastic Pipes break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Data Center Plastic Pipes Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Data Center Plastic Pipes by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Data Center Plastic Pipes by Country/Region, 2021, 2025 & 2032
- 2.2 Data Center Plastic Pipes Segment by Type
 - 2.2.1 PP Pipes
 - 2.2.2 PE Pipes
 - 2.2.3 PVC Pipes
 - 2.2.4 Other
 - 2.2.5 Data Center Plastic Pipes Sales by Type
 - 2.2.5.1 Global Data Center Plastic Pipes Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Data Center Plastic Pipes Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Data Center Plastic Pipes Sale Price by Type (2021-2026)
- 2.3 Data Center Plastic Pipes Segment by Piping Function
 - 2.3.1 Facility Water System (FWS) Pipe
 - 2.3.2 Technology Cooling System (TCS) Pipe
 - 2.3.3 CDU-to-Rack Distribution Pipe
 - 2.3.4 Others
 - 2.3.5 Data Center Plastic Pipes Sales by Piping Function
 - 2.3.5.1 Global Data Center Plastic Pipes Sales Market Share by Piping Function (2021-2026)

2.3.5.2 Global Data Center Plastic Pipes Revenue and Market Share by Piping Function (2021-2026)

2.3.5.3 Global Data Center Plastic Pipes Sale Price by Piping Function (2021-2026)

2.4 Data Center Plastic Pipes Segment by Application

2.4.1 Enterprise Data Centers

2.4.2 Cloud & Hyperscale Data Centers

2.4.3 Edge Data Centers

2.4.4 Others

2.4.5 Data Center Plastic Pipes Sales by Application

2.4.5.1 Global Data Center Plastic Pipes Sale Market Share by Application (2021-2026)

2.4.5.2 Global Data Center Plastic Pipes Revenue and Market Share by Application (2021-2026)

2.4.5.3 Global Data Center Plastic Pipes Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Data Center Plastic Pipes Breakdown Data by Company

3.1.1 Global Data Center Plastic Pipes Annual Sales by Company (2021-2026)

3.1.2 Global Data Center Plastic Pipes Sales Market Share by Company (2021-2026)

3.2 Global Data Center Plastic Pipes Annual Revenue by Company (2021-2026)

3.2.1 Global Data Center Plastic Pipes Revenue by Company (2021-2026)

3.2.2 Global Data Center Plastic Pipes Revenue Market Share by Company (2021-2026)

3.3 Global Data Center Plastic Pipes Sale Price by Company

3.4 Key Manufacturers Data Center Plastic Pipes Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Data Center Plastic Pipes Product Location Distribution

3.4.2 Players Data Center Plastic Pipes Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR DATA CENTER PLASTIC PIPES BY GEOGRAPHIC REGION

4.1 World Historic Data Center Plastic Pipes Market Size by Geographic Region

(2021-2026)

4.1.1 Global Data Center Plastic Pipes Annual Sales by Geographic Region

(2021-2026)

4.1.2 Global Data Center Plastic Pipes Annual Revenue by Geographic Region

(2021-2026)

4.2 World Historic Data Center Plastic Pipes Market Size by Country/Region

(2021-2026)

4.2.1 Global Data Center Plastic Pipes Annual Sales by Country/Region (2021-2026)

4.2.2 Global Data Center Plastic Pipes Annual Revenue by Country/Region

(2021-2026)

4.3 Americas Data Center Plastic Pipes Sales Growth

4.4 APAC Data Center Plastic Pipes Sales Growth

4.5 Europe Data Center Plastic Pipes Sales Growth

4.6 Middle East & Africa Data Center Plastic Pipes Sales Growth

5 AMERICAS

5.1 Americas Data Center Plastic Pipes Sales by Country

5.1.1 Americas Data Center Plastic Pipes Sales by Country (2021-2026)

5.1.2 Americas Data Center Plastic Pipes Revenue by Country (2021-2026)

5.2 Americas Data Center Plastic Pipes Sales by Type (2021-2026)

5.3 Americas Data Center Plastic Pipes Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Data Center Plastic Pipes Sales by Region

6.1.1 APAC Data Center Plastic Pipes Sales by Region (2021-2026)

6.1.2 APAC Data Center Plastic Pipes Revenue by Region (2021-2026)

6.2 APAC Data Center Plastic Pipes Sales by Type (2021-2026)

6.3 APAC Data Center Plastic Pipes Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Data Center Plastic Pipes by Country

7.1.1 Europe Data Center Plastic Pipes Sales by Country (2021-2026)

7.1.2 Europe Data Center Plastic Pipes Revenue by Country (2021-2026)

7.2 Europe Data Center Plastic Pipes Sales by Type (2021-2026)

7.3 Europe Data Center Plastic Pipes Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Data Center Plastic Pipes by Country

8.1.1 Middle East & Africa Data Center Plastic Pipes Sales by Country (2021-2026)

8.1.2 Middle East & Africa Data Center Plastic Pipes Revenue by Country (2021-2026)

8.2 Middle East & Africa Data Center Plastic Pipes Sales by Type (2021-2026)

8.3 Middle East & Africa Data Center Plastic Pipes Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Data Center Plastic Pipes

10.3 Manufacturing Process Analysis of Data Center Plastic Pipes

10.4 Industry Chain Structure of Data Center Plastic Pipes

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Data Center Plastic Pipes Distributors

11.3 Data Center Plastic Pipes Customer

12 WORLD FORECAST REVIEW FOR DATA CENTER PLASTIC PIPES BY GEOGRAPHIC REGION

12.1 Global Data Center Plastic Pipes Market Size Forecast by Region

12.1.1 Global Data Center Plastic Pipes Forecast by Region (2027-2032)

12.1.2 Global Data Center Plastic Pipes Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Data Center Plastic Pipes Forecast by Type (2027-2032)

12.7 Global Data Center Plastic Pipes Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 GF Piping

13.1.1 GF Piping Company Information

13.1.2 GF Piping Data Center Plastic Pipes Product Portfolios and Specifications

13.1.3 GF Piping Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 GF Piping Main Business Overview

13.1.5 GF Piping Latest Developments

13.2 AGRU

13.2.1 AGRU Company Information

13.2.2 AGRU Data Center Plastic Pipes Product Portfolios and Specifications

13.2.3 AGRU Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.2.4 AGRU Main Business Overview
- 13.2.5 AGRU Latest Developments
- 13.3 Watts
 - 13.3.1 Watts Company Information
 - 13.3.2 Watts Data Center Plastic Pipes Product Portfolios and Specifications
 - 13.3.3 Watts Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Watts Main Business Overview
 - 13.3.5 Watts Latest Developments
- 13.4 IPEX
 - 13.4.1 IPEX Company Information
 - 13.4.2 IPEX Data Center Plastic Pipes Product Portfolios and Specifications
 - 13.4.3 IPEX Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 IPEX Main Business Overview
 - 13.4.5 IPEX Latest Developments
- 13.5 Aquatherm GmbH
 - 13.5.1 Aquatherm GmbH Company Information
 - 13.5.2 Aquatherm GmbH Data Center Plastic Pipes Product Portfolios and Specifications
 - 13.5.3 Aquatherm GmbH Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Aquatherm GmbH Main Business Overview
 - 13.5.5 Aquatherm GmbH Latest Developments
- 13.6 POLYMELT Pipe Systems GmbH
 - 13.6.1 POLYMELT Pipe Systems GmbH Company Information
 - 13.6.2 POLYMELT Pipe Systems GmbH Data Center Plastic Pipes Product Portfolios and Specifications
 - 13.6.3 POLYMELT Pipe Systems GmbH Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 POLYMELT Pipe Systems GmbH Main Business Overview
 - 13.6.5 POLYMELT Pipe Systems GmbH Latest Developments
- 13.7 ISCO Industries
 - 13.7.1 ISCO Industries Company Information
 - 13.7.2 ISCO Industries Data Center Plastic Pipes Product Portfolios and Specifications
 - 13.7.3 ISCO Industries Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 ISCO Industries Main Business Overview
 - 13.7.5 ISCO Industries Latest Developments

13.8 KPS Piping Systems

13.8.1 KPS Piping Systems Company Information

13.8.2 KPS Piping Systems Data Center Plastic Pipes Product Portfolios and Specifications

13.8.3 KPS Piping Systems Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 KPS Piping Systems Main Business Overview

13.8.5 KPS Piping Systems Latest Developments

13.9 Aliaxis

13.9.1 Aliaxis Company Information

13.9.2 Aliaxis Data Center Plastic Pipes Product Portfolios and Specifications

13.9.3 Aliaxis Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Aliaxis Main Business Overview

13.9.5 Aliaxis Latest Developments

13.10 Asahi/America

13.10.1 Asahi/America Company Information

13.10.2 Asahi/America Data Center Plastic Pipes Product Portfolios and Specifications

13.10.3 Asahi/America Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Asahi/America Main Business Overview

13.10.5 Asahi/America Latest Developments

13.11 SIMONA

13.11.1 SIMONA Company Information

13.11.2 SIMONA Data Center Plastic Pipes Product Portfolios and Specifications

13.11.3 SIMONA Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 SIMONA Main Business Overview

13.11.5 SIMONA Latest Developments

13.12 NIBCO

13.12.1 NIBCO Company Information

13.12.2 NIBCO Data Center Plastic Pipes Product Portfolios and Specifications

13.12.3 NIBCO Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 NIBCO Main Business Overview

13.12.5 NIBCO Latest Developments

13.13 Pipelife

13.13.1 Pipelife Company Information

13.13.2 Pipelife Data Center Plastic Pipes Product Portfolios and Specifications

13.13.3 Pipelife Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Pipelife Main Business Overview

13.13.5 Pipelife Latest Developments

13.14 Liansu Technology

13.14.1 Liansu Technology Company Information

13.14.2 Liansu Technology Data Center Plastic Pipes Product Portfolios and Specifications

13.14.3 Liansu Technology Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Liansu Technology Main Business Overview

13.14.5 Liansu Technology Latest Developments

13.15 Zhongtong pipe

13.15.1 Zhongtong pipe Company Information

13.15.2 Zhongtong pipe Data Center Plastic Pipes Product Portfolios and Specifications

13.15.3 Zhongtong pipe Data Center Plastic Pipes Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Zhongtong pipe Main Business Overview

13.15.5 Zhongtong pipe Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Data Center Plastic Pipes Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Data Center Plastic Pipes Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of PP Pipes

Table 4. Major Players of PE Pipes

Table 5. Major Players of PVC Pipes

Table 6. Major Players of Other

Table 7. Global Data Center Plastic Pipes Sales by Type (2021-2026) & (K Meter)

Table 8. Global Data Center Plastic Pipes Sales Market Share by Type (2021-2026)

Table 9. Global Data Center Plastic Pipes Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Data Center Plastic Pipes Revenue Market Share by Type (2021-2026)

Table 11. Global Data Center Plastic Pipes Sale Price by Type (2021-2026) & (US\$/Meter)

Table 12. Major Players of Facility Water System (FWS) Pipe

Table 13. Major Players of Technology Cooling System (TCS) Pipe

Table 14. Major Players of CDU-to-Rack Distribution Pipe

Table 15. Major Players of Others

Table 16. Global Data Center Plastic Pipes Sales by Piping Function (2021-2026) & (K Meter)

Table 17. Global Data Center Plastic Pipes Sales Market Share by Piping Function (2021-2026)

Table 18. Global Data Center Plastic Pipes Revenue by Piping Function (2021-2026) & (\$ million)

Table 19. Global Data Center Plastic Pipes Revenue Market Share by Piping Function (2021-2026)

Table 20. Global Data Center Plastic Pipes Sale Price by Piping Function (2021-2026) & (US\$/Meter)

Table 21. Global Data Center Plastic Pipes Sale by Application (2021-2026) & (K Meter)

Table 22. Global Data Center Plastic Pipes Sale Market Share by Application (2021-2026)

Table 23. Global Data Center Plastic Pipes Revenue by Application (2021-2026) & (\$ million)

Table 24. Global Data Center Plastic Pipes Revenue Market Share by Application

(2021-2026)

Table 25. Global Data Center Plastic Pipes Sale Price by Application (2021-2026) & (US\$/Meter)

Table 26. Global Data Center Plastic Pipes Sales by Company (2021-2026) & (K Meter)

Table 27. Global Data Center Plastic Pipes Sales Market Share by Company (2021-2026)

Table 28. Global Data Center Plastic Pipes Revenue by Company (2021-2026) & (\$ millions)

Table 29. Global Data Center Plastic Pipes Revenue Market Share by Company (2021-2026)

Table 30. Global Data Center Plastic Pipes Sale Price by Company (2021-2026) & (US\$/Meter)

Table 31. Key Manufacturers Data Center Plastic Pipes Producing Area Distribution and Sales Area

Table 32. Players Data Center Plastic Pipes Products Offered

Table 33. Data Center Plastic Pipes Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 34. New Products and Potential Entrants

Table 35. Market M&A Activity & Strategy

Table 36. Global Data Center Plastic Pipes Sales by Geographic Region (2021-2026) & (K Meter)

Table 37. Global Data Center Plastic Pipes Sales Market Share Geographic Region (2021-2026)

Table 38. Global Data Center Plastic Pipes Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 39. Global Data Center Plastic Pipes Revenue Market Share by Geographic Region (2021-2026)

Table 40. Global Data Center Plastic Pipes Sales by Country/Region (2021-2026) & (K Meter)

Table 41. Global Data Center Plastic Pipes Sales Market Share by Country/Region (2021-2026)

Table 42. Global Data Center Plastic Pipes Revenue by Country/Region (2021-2026) & (\$ millions)

Table 43. Global Data Center Plastic Pipes Revenue Market Share by Country/Region (2021-2026)

Table 44. Americas Data Center Plastic Pipes Sales by Country (2021-2026) & (K Meter)

Table 45. Americas Data Center Plastic Pipes Sales Market Share by Country (2021-2026)

Table 46. Americas Data Center Plastic Pipes Revenue by Country (2021-2026) & (\$ millions)

Table 47. Americas Data Center Plastic Pipes Sales by Type (2021-2026) & (K Meter)

Table 48. Americas Data Center Plastic Pipes Sales by Application (2021-2026) & (K Meter)

Table 49. APAC Data Center Plastic Pipes Sales by Region (2021-2026) & (K Meter)

Table 50. APAC Data Center Plastic Pipes Sales Market Share by Region (2021-2026)

Table 51. APAC Data Center Plastic Pipes Revenue by Region (2021-2026) & (\$ millions)

Table 52. APAC Data Center Plastic Pipes Sales by Type (2021-2026) & (K Meter)

Table 53. APAC Data Center Plastic Pipes Sales by Application (2021-2026) & (K Meter)

Table 54. Europe Data Center Plastic Pipes Sales by Country (2021-2026) & (K Meter)

Table 55. Europe Data Center Plastic Pipes Revenue by Country (2021-2026) & (\$ millions)

Table 56. Europe Data Center Plastic Pipes Sales by Type (2021-2026) & (K Meter)

Table 57. Europe Data Center Plastic Pipes Sales by Application (2021-2026) & (K Meter)

Table 58. Middle East & Africa Data Center Plastic Pipes Sales by Country (2021-2026) & (K Meter)

Table 59. Middle East & Africa Data Center Plastic Pipes Revenue Market Share by Country (2021-2026)

Table 60. Middle East & Africa Data Center Plastic Pipes Sales by Type (2021-2026) & (K Meter)

Table 61. Middle East & Africa Data Center Plastic Pipes Sales by Application (2021-2026) & (K Meter)

Table 62. Key Market Drivers & Growth Opportunities of Data Center Plastic Pipes

Table 63. Key Market Challenges & Risks of Data Center Plastic Pipes

Table 64. Key Industry Trends of Data Center Plastic Pipes

Table 65. Data Center Plastic Pipes Raw Material

Table 66. Key Suppliers of Raw Materials

Table 67. Data Center Plastic Pipes Distributors List

Table 68. Data Center Plastic Pipes Customer List

Table 69. Global Data Center Plastic Pipes Sales Forecast by Region (2027-2032) & (K Meter)

Table 70. Global Data Center Plastic Pipes Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 71. Americas Data Center Plastic Pipes Sales Forecast by Country (2027-2032) & (K Meter)

Table 72. Americas Data Center Plastic Pipes Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 73. APAC Data Center Plastic Pipes Sales Forecast by Region (2027-2032) & (K Meter)

Table 74. APAC Data Center Plastic Pipes Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 75. Europe Data Center Plastic Pipes Sales Forecast by Country (2027-2032) & (K Meter)

Table 76. Europe Data Center Plastic Pipes Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 77. Middle East & Africa Data Center Plastic Pipes Sales Forecast by Country (2027-2032) & (K Meter)

Table 78. Middle East & Africa Data Center Plastic Pipes Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. Global Data Center Plastic Pipes Sales Forecast by Type (2027-2032) & (K Meter)

Table 80. Global Data Center Plastic Pipes Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 81. Global Data Center Plastic Pipes Sales Forecast by Application (2027-2032) & (K Meter)

Table 82. Global Data Center Plastic Pipes Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 83. GF Piping Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 84. GF Piping Data Center Plastic Pipes Product Portfolios and Specifications

Table 85. GF Piping Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 86. GF Piping Main Business

Table 87. GF Piping Latest Developments

Table 88. AGRU Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 89. AGRU Data Center Plastic Pipes Product Portfolios and Specifications

Table 90. AGRU Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 91. AGRU Main Business

Table 92. AGRU Latest Developments

Table 93. Watts Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 94. Watts Data Center Plastic Pipes Product Portfolios and Specifications

Table 95. Watts Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 96. Watts Main Business

Table 97. Watts Latest Developments

Table 98. IPEX Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 99. IPEX Data Center Plastic Pipes Product Portfolios and Specifications

Table 100. IPEX Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 101. IPEX Main Business

Table 102. IPEX Latest Developments

Table 103. Aquatherm GmbH Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 104. Aquatherm GmbH Data Center Plastic Pipes Product Portfolios and Specifications

Table 105. Aquatherm GmbH Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 106. Aquatherm GmbH Main Business

Table 107. Aquatherm GmbH Latest Developments

Table 108. POLYMELT Pipe Systems GmbH Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 109. POLYMELT Pipe Systems GmbH Data Center Plastic Pipes Product Portfolios and Specifications

Table 110. POLYMELT Pipe Systems GmbH Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 111. POLYMELT Pipe Systems GmbH Main Business

Table 112. POLYMELT Pipe Systems GmbH Latest Developments

Table 113. ISCO Industries Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 114. ISCO Industries Data Center Plastic Pipes Product Portfolios and Specifications

Table 115. ISCO Industries Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 116. ISCO Industries Main Business

Table 117. ISCO Industries Latest Developments

Table 118. KPS Piping Systems Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 119. KPS Piping Systems Data Center Plastic Pipes Product Portfolios and Specifications

Table 120. KPS Piping Systems Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 121. KPS Piping Systems Main Business

Table 122. KPS Piping Systems Latest Developments

Table 123. Aliaxis Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 124. Aliaxis Data Center Plastic Pipes Product Portfolios and Specifications

Table 125. Aliaxis Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 126. Aliaxis Main Business

Table 127. Aliaxis Latest Developments

Table 128. Asahi/America Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 129. Asahi/America Data Center Plastic Pipes Product Portfolios and Specifications

Table 130. Asahi/America Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 131. Asahi/America Main Business

Table 132. Asahi/America Latest Developments

Table 133. SIMONA Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 134. SIMONA Data Center Plastic Pipes Product Portfolios and Specifications

Table 135. SIMONA Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 136. SIMONA Main Business

Table 137. SIMONA Latest Developments

Table 138. NIBCO Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 139. NIBCO Data Center Plastic Pipes Product Portfolios and Specifications

Table 140. NIBCO Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 141. NIBCO Main Business

Table 142. NIBCO Latest Developments

Table 143. Pipelife Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 144. Pipelife Data Center Plastic Pipes Product Portfolios and Specifications

Table 145. Pipelife Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 146. Pipelife Main Business

Table 147. Pipelife Latest Developments

Table 148. Liansu Technology Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 149. Liansu Technology Data Center Plastic Pipes Product Portfolios and Specifications

Table 150. Liansu Technology Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 151. Liansu Technology Main Business

Table 152. Liansu Technology Latest Developments

Table 153. Zhongtong pipe Basic Information, Data Center Plastic Pipes Manufacturing Base, Sales Area and Its Competitors

Table 154. Zhongtong pipe Data Center Plastic Pipes Product Portfolios and Specifications

Table 155. Zhongtong pipe Data Center Plastic Pipes Sales (K Meter), Revenue (\$ Million), Price (US\$/Meter) and Gross Margin (2021-2026)

Table 156. Zhongtong pipe Main Business

Table 157. Zhongtong pipe Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Data Center Plastic Pipes
- Figure 2. Data Center Plastic Pipes Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Data Center Plastic Pipes Sales Growth Rate 2021-2032 (K Meter)
- Figure 7. Global Data Center Plastic Pipes Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Data Center Plastic Pipes Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Data Center Plastic Pipes Sales Market Share by Country/Region (2025)
- Figure 10. Data Center Plastic Pipes Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of PP Pipes
- Figure 12. Product Picture of PE Pipes
- Figure 13. Product Picture of PVC Pipes
- Figure 14. Product Picture of Other
- Figure 15. Global Data Center Plastic Pipes Sales Market Share by Type in 2026
- Figure 16. Global Data Center Plastic Pipes Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Facility Water System (FWS) Pipe
- Figure 18. Product Picture of Technology Cooling System (TCS) Pipe
- Figure 19. Product Picture of CDU-to-Rack Distribution Pipe
- Figure 20. Product Picture of Others
- Figure 21. Global Data Center Plastic Pipes Sales Market Share by Piping Function in 2026
- Figure 22. Global Data Center Plastic Pipes Revenue Market Share by Piping Function (2021-2026)
- Figure 23. Data Center Plastic Pipes Consumed in Enterprise Data Centers
- Figure 24. Global Data Center Plastic Pipes Market: Enterprise Data Centers (2021-2026) & (K Meter)
- Figure 25. Data Center Plastic Pipes Consumed in Cloud & Hyperscale Data Centers
- Figure 26. Global Data Center Plastic Pipes Market: Cloud & Hyperscale Data Centers (2021-2026) & (K Meter)
- Figure 27. Data Center Plastic Pipes Consumed in Edge Data Centers

Figure 28. Global Data Center Plastic Pipes Market: Edge Data Centers (2021-2026) & (K Meter)

Figure 29. Data Center Plastic Pipes Consumed in Others

Figure 30. Global Data Center Plastic Pipes Market: Others (2021-2026) & (K Meter)

Figure 31. Global Data Center Plastic Pipes Sale Market Share by Application (2025)

Figure 32. Global Data Center Plastic Pipes Revenue Market Share by Application in 2025

Figure 33. Data Center Plastic Pipes Sales by Company in 2025 (K Meter)

Figure 34. Global Data Center Plastic Pipes Sales Market Share by Company in 2025

Figure 35. Data Center Plastic Pipes Revenue by Company in 2025 (\$ millions)

Figure 36. Global Data Center Plastic Pipes Revenue Market Share by Company in 2025

Figure 37. Global Data Center Plastic Pipes Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Data Center Plastic Pipes Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Data Center Plastic Pipes Sales 2021-2026 (K Meter)

Figure 40. Americas Data Center Plastic Pipes Revenue 2021-2026 (\$ millions)

Figure 41. APAC Data Center Plastic Pipes Sales 2021-2026 (K Meter)

Figure 42. APAC Data Center Plastic Pipes Revenue 2021-2026 (\$ millions)

Figure 43. Europe Data Center Plastic Pipes Sales 2021-2026 (K Meter)

Figure 44. Europe Data Center Plastic Pipes Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Data Center Plastic Pipes Sales 2021-2026 (K Meter)

Figure 46. Middle East & Africa Data Center Plastic Pipes Revenue 2021-2026 (\$ millions)

Figure 47. Americas Data Center Plastic Pipes Sales Market Share by Country in 2025

Figure 48. Americas Data Center Plastic Pipes Revenue Market Share by Country (2021-2026)

Figure 49. Americas Data Center Plastic Pipes Sales Market Share by Type (2021-2026)

Figure 50. Americas Data Center Plastic Pipes Sales Market Share by Application (2021-2026)

Figure 51. United States Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Data Center Plastic Pipes Sales Market Share by Region in 2025

Figure 56. APAC Data Center Plastic Pipes Revenue Market Share by Region

(2021-2026)

Figure 57. APAC Data Center Plastic Pipes Sales Market Share by Type (2021-2026)

Figure 58. APAC Data Center Plastic Pipes Sales Market Share by Application
(2021-2026)

Figure 59. China Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Data Center Plastic Pipes Revenue Growth 2021-2026 (\$
millions)

Figure 62. Southeast Asia Data Center Plastic Pipes Revenue Growth 2021-2026 (\$
millions)

Figure 63. India Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Data Center Plastic Pipes Revenue Growth 2021-2026 (\$
millions)

Figure 66. Europe Data Center Plastic Pipes Sales Market Share by Country in 2025

Figure 67. Europe Data Center Plastic Pipes Revenue Market Share by Country
(2021-2026)

Figure 68. Europe Data Center Plastic Pipes Sales Market Share by Type (2021-2026)

Figure 69. Europe Data Center Plastic Pipes Sales Market Share by Application
(2021-2026)

Figure 70. Germany Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Data Center Plastic Pipes Sales Market Share by
Country (2021-2026)

Figure 76. Middle East & Africa Data Center Plastic Pipes Sales Market Share by Type
(2021-2026)

Figure 77. Middle East & Africa Data Center Plastic Pipes Sales Market Share by
Application (2021-2026)

Figure 78. Egypt Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Data Center Plastic Pipes Revenue Growth 2021-2026 (\$
millions)

Figure 80. Israel Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Data Center Plastic Pipes Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Data Center Plastic Pipes Revenue Growth 2021-2026 (\$
millions)

Figure 83. Manufacturing Cost Structure Analysis of Data Center Plastic Pipes in 2026

Figure 84. Manufacturing Process Analysis of Data Center Plastic Pipes

Figure 85. Industry Chain Structure of Data Center Plastic Pipes

Figure 86. Channels of Distribution

Figure 87. Global Data Center Plastic Pipes Sales Market Forecast by Region
(2027-2032)

Figure 88. Global Data Center Plastic Pipes Revenue Market Share Forecast by Region
(2027-2032)

Figure 89. Global Data Center Plastic Pipes Sales Market Share Forecast by Type
(2027-2032)

Figure 90. Global Data Center Plastic Pipes Revenue Market Share Forecast by Type
(2027-2032)

Figure 91. Global Data Center Plastic Pipes Sales Market Share Forecast by
Application (2027-2032)

Figure 92. Global Data Center Plastic Pipes Revenue Market Share Forecast by
Application (2027-2032)

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