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Global Data Center Water Treatment Solution Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Data Center Water Treatment Solution market size is predicted to grow from US$ 2629 million in 2025 to US$ 5920 million in 2032; it is expected to grow at a CAGR of 12.3% from 2026 to 2032.

Data center water treatment solutions refer to comprehensive technical schemes for water quality management and treatment, designed for data center cooling systems, liquid cooling systems, and auxiliary water circulation systems. By employing technologies such as filtration, purification, softening, demineralization, sterilization, corrosion prevention, and water quality monitoring, these solutions ensure the stability, safety, and long-term operational reliability of the data center's cooling media.

Key Findings

Data Center Water Treatment Solution is becoming a critical infrastructure component for reliable data center cooling operations

Cooling water management remains the primary application area across global data center facilities

Liquid cooling deployment is creating new demand for advanced water quality control solutions

AI data centers are increasing requirements for high-reliability cooling fluid management

North America and Asia Pacific represent major markets for data center water management solutions

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Market Trends

The Data Center Water Treatment Solution industry is evolving from traditional cooling water maintenance toward intelligent and integrated water management platforms. As data centers move toward higher computing density, AI servers, and liquid cooling architectures, water treatment requirements are shifting from basic corrosion and scaling control toward precise water quality management, real-time monitoring, and resource optimization. Future solutions are expected to integrate digital monitoring, automated control, water recycling, and energy-efficient operation capabilities to support sustainable data center development. Liquid cooling expansion, particularly in AI computing environments, is expected to increase demand for specialized water treatment technologies with higher reliability and stricter quality requirements.

Market Dynamics

Drivers

The expansion of global data center infrastructure is the primary driver for Data Center Water Treatment Solution demand. Increasing deployment of cloud computing, AI computing clusters, and high-performance servers requires more efficient thermal management systems. The growing adoption of liquid cooling technologies is further increasing the need for water purification, corrosion prevention, contamination control, and intelligent monitoring solutions.

Restraints

Market development is limited by system complexity, high reliability requirements, and differences among cooling architectures. Data center operators require stable long-term operation, which increases requirements for water quality control accuracy and system validation. In addition, investment costs associated with advanced treatment equipment, monitoring systems, and maintenance services may affect adoption among smaller-scale facilities.

Opportunities

The transition toward AI data centers and high-density computing creates significant opportunities for advanced water treatment solutions. Emerging opportunities include liquid cooling water management, closed-loop water circulation optimization, wastewater recovery, and intelligent water management platforms. Companies capable of integrating water treatment technologies with digital monitoring and operational

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optimization are expected to benefit from future market development.

Challenges

The industry faces challenges including technology integration, standardization of water quality requirements, and changing data center cooling architectures. Different cooling systems require customized treatment approaches, increasing engineering complexity. At the same time, data centers are under increasing pressure to reduce water consumption and improve sustainability, requiring continuous innovation in water efficiency and recycling technologies.

Industry Chain Analysis

The Data Center Water Treatment Solution industry chain consists of upstream materials and equipment, midstream system integration and service providers, and downstream data center operators. The upstream segment includes filtration materials, membranes, water treatment chemicals, pumps, sensors, control components, and related equipment. These components determine treatment efficiency, reliability, and system operating performance.

The midstream segment focuses on water treatment system design, equipment integration, water quality monitoring, chemical management, and operation services. The main value creation areas include treatment process optimization, intelligent monitoring capability, and customized solutions for different cooling architectures. The downstream market covers cloud data centers, enterprise data centers, AI computing facilities, high-performance computing centers, and telecom infrastructure. With increasing power density and liquid cooling adoption, water treatment is becoming an important part of overall data center infrastructure management.

Segment Insights

Data Center Water Treatment Solution can be segmented by treatment object, technology type, cooling architecture, system scale, and functional module. Cooling water treatment remains the largest application segment because most traditional data centers continue to rely on cooling towers and chilled water systems. These solutions focus on preventing scaling, corrosion, and microbial growth to maintain cooling efficiency.

Liquid cooling water treatment represents the fastest-growing segment due to the

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expansion of AI servers and high-density computing systems. Compared with traditional cooling systems, liquid cooling requires stricter control of purity, conductivity, contamination, and corrosion risks. Future market opportunities are expected to concentrate on AI data centers, direct-to-chip liquid cooling systems, and intelligent water management platforms.

Downstream Market Opportunities

The main downstream opportunities for Data Center Water Treatment Solution are concentrated in hyperscale data centers, cloud computing infrastructure, AI computing centers, and sustainable data center projects. Customers increasingly require solutions that improve cooling reliability while reducing water consumption and operating costs. The development of AI infrastructure is creating additional demand for advanced water quality management, particularly in liquid-cooled computing environments.

Regional Insights

North America is one of the largest markets for Data Center Water Treatment Solution due to its mature data center ecosystem, large-scale cloud infrastructure, and increasing deployment of AI computing facilities. The region has strong demand for advanced cooling management and sustainable water utilization technologies.

Asia Pacific is expected to be one of the fastest-growing regions, driven by expanding data center construction, digital infrastructure development, and increasing AI computing investment. Markets such as China, Japan, South Korea, and Southeast Asia are strengthening data center capacity, creating opportunities for water treatment equipment, monitoring systems, and integrated water management solutions. Regional market differences are mainly reflected in water availability, regulatory requirements, cooling technology adoption, and infrastructure maturity.

Competitive Landscape Analysis

The Data Center Water Treatment Solution market features competition among global water treatment companies, industrial water management providers, equipment suppliers, and digital water management solution providers. Competitive advantages are mainly determined by integrated solution capabilities, water treatment technology expertise, monitoring and control capabilities, engineering experience, and long-term service capabilities. Companies with comprehensive capabilities covering equipment supply, chemical management, digital monitoring, and operation services are better

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positioned to serve large-scale data center customers. As AI data centers accelerate the adoption of liquid cooling, competition is expected to increasingly focus on customized solutions, sustainability performance, and intelligent water management capabilities.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Data Center Water Treatment Solution landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Data Center Water Treatment Solution portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Data Center Water Treatment Solution market.

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

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Water Treatment Solution market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

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Chemical Water Treatment Solutions

Membrane Treatment Solutions

Physical Treatment Solutions

Smart Water Management Solutions

Segmentation by Subject of the Action:

Circulating Cooling Water Treatment Solutions

Liquid Cooling System Water Treatment Solutions

Ultrapure and Purified Water Treatment Solutions

Wastewater Recovery and Reuse Solutions

Segmentation by Data Center Cooling Methods:

Cooling Tower Water Treatment Solutions

Chilled Water System Water Treatment Solutions

Closed-Loop Water Treatment Solutions

Cold Plate Liquid Cooling Water Treatment Solutions

Segmentation by Application:

AI Data Centers

Cloud Computing Data Centers

Edge Data Centers

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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

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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 analyzing the company's coverage, product portfolio, its market penetration.

Veolia

Solenis

Ecolab

Xylem

SUEZ

Kurita Water Industries

Aquatech International

Gradiant

Toray Industries

Lenntech

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IDE Technologies

Watts Water Technologies

Chem-Aqua

Saltworks Technologies

Veralto

CECEP Environmental Protection

Shanghai Xiba

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