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Global HVAC Valve For Data Center Market Growth 2026-2032

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Abstracts

The global HVAC Valve For Data Center market size is predicted to grow from US$ 255 million in 2025 to US$ 528 million in 2032; it is expected to grow at a CAGR of 11.2% from 2026 to 2032.

In 2024, global HVAC Valve For Data Center production capacity is 2 million units, with production volume reached approximately 1.2 million units, with an average global market price of around US$ 190 per unit. The market gross margin is mainly 30%-40%.

In this context, HVAC valves refer to professional-grade regulating, isolating, balancing, and controlling valves used in data center cooling systems (including chilled water, cooling water, CRAH/CRAC, in-row cooling, liquid cooling, etc.). These valves precisely manage fluid flow, pressure, and temperature to ensure stable, redundant, and energy-efficient server rack cooling. They typically feature high-precision regulation (0–10V/4–20mA/Modbus/BACnet), fast response, extremely low leakage, corrosion-resistant materials, high cycle life (millions+ cycles), and deep integration with BMS/BAS. They are key components for achieving PUE optimization, cold/hot aisle isolation management, dynamic heat dissipation control, and stable temperature control in data centers under high AI load scenarios.

The upstream of the data center HVAC valve industry chain includes copper/stainless steel valve bodies, valve cores, seals (EPDM, PTFE), electric/intelligent actuators, flow/pressure sensors, control chips, and industrial communication modules. The midstream comprises valve manufacturers and system integrators, with core components involving the precision machining, assembly, calibration, and communication protocol integration of products such as ball valves, butterfly valves, PICVs, and control valves. The downstream mainly consists of data center cooling

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system providers (CRAH/CRAC manufacturers, modular data center manufacturers, liquid cooling system providers), EPC/electromechanical contractors, telecom operators (Hyperscale, Colocation), major internet companies, and financial industry data centers. Demand is driven by the high reliability, high efficiency, and real-time regulation requirements of chilled water systems, cooling tower systems, terminal air conditioning systems (CRAH), and liquid cooling systems, placing higher demands on valve precision, lifespan, maintainability, and intelligence, forming a complete closed-loop industry chain from "materials ? valve body/actuator ? valve manufacturing ? BMS integration ? data center applications."

The mainstream customers of data center HVAC valves are mainly concentrated in several core sectors, including hyperscale cloud providers, internet giants, colocation operators, financial and high-reliability industry data centers, and modular data center and liquid cooling system suppliers. These include Amazon AWS, Microsoft Azure, Google Cloud, Meta, Oracle, IBM Cloud, Equinix, Digital Realty, NTT Global Data Centers, Telehouse, Compass Datacenters, Switch, China Telecom, China Mobile, China Unicom, Alibaba Cloud, Tencent, Baidu, GDS, GDS Holdings, and GDS Holdings, as well as various financial data centers (bank core data centers, securities trading centers, clearing institutions) and high-reliability data centers of government agencies. Additionally, CRAH/CRAC vendors (such as Vertiv, Schneider Electric, Stulz, Airedale), liquid cooling companies (such as Submer, CoolIT, Invesco, and Inspur Liquid Cooling), and others... EPC/EMC general contractors (such as Cushman & Wakefield, Jones Lang LaSalle, and AECOM) are also key customer groups for valve procurement and integration, constituting the core demand side of global data center cooling systems.

The market potential for HVAC valves in data centers is expanding rapidly, driven by the exponential growth of global computing demand, the shift toward high-density AI workloads, and the structural evolution from traditional CRAC-based cooling to highly dynamic chilled-water and liquid-cooling architectures. HVAC valves—covering control valves, PICVs, isolation valves, balancing valves, and intelligent actuated valves—serve as the fundamental flow-control elements that regulate chilled water and cooling water distribution, ensure stable supply–return temperature deltas, and maintain the precision thermal environment required by modern IT loads. As global data center white-space capacity expands at a CAGR of 10–15% and AI server deployment accelerates, demand for high-precision, fast-response and communication-integrated valves is expected to rise consistently across hyperscale, colocation and enterprise segments.

A major source of market momentum comes from the transition toward high-density

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racks (20–80 kW standard, 100–500 kW for AI training clusters). These IT loads impose rapid thermal fluctuations and higher coolant flow requirements, necessitating precise modulation valves with low hysteresis, leakage-class VI sealing, and integrated differential-pressure sensing to maintain stable coil performance. This is pushing demand toward smart control valves and PICVs supporting 0–10V, 4–20 mA, Modbus and BACnet, enabling digital-twin-based control and predictive maintenance. As a result, the average valve content per MW of data-center cooling capacity is increasing, with chilled-water systems for hyperscale campuses typically requiring thousands of valves across AHUs, CRAHs, modular chilled-water plants and secondary distribution loops. Large-scale projects in North America, Europe, and Asia increasingly specify intelligent valve platforms from leading vendors, reflecting a structural upgrade cycle that expands both unit volume and ASP.

Another significant growth engine is the rise of liquid-cooling technologies, including cold plates, rear-door heat exchangers (RDHx), and immersion cooling. These technologies require compact, corrosion-resistant, high-cycle valves capable of precise flow balancing at the rack or CDU level. Liquid cooling introduces a new set of valve applications—rack-level flow control, CDU bypass valves, manifold valves—and substantially increases the number of valves per cabinet compared with airflow-based systems. As AI clusters continue to scale, liquid cooling is expected to grow from <5% penetration today to 20–40% in upcoming hyperscale builds, creating a multi-year demand surge for specialized valve solutions.

Geographically, North America and Europe remain the largest markets driven by hyperscale investment from AWS, Google, Meta, Microsoft, Oracle and major colocation operators such as Equinix and Digital Realty. However, the fastest growth is occurring in Asia-Pacific—particularly China, India, Singapore, Japan and emerging Southeast Asia—where construction of cloud and AI infrastructure is supported by national digital-economy policies, rapid cloud adoption and the relocation of compute clusters to power-stable regions. These regions typically favor efficient chilled-water designs, amplifying valve intensity across new builds.

Overall, the HVAC valve market for data centers benefits from a structurally increasing base of IT load, rising cooling complexity, and a long-term upgrade cycle toward intelligent, networked and liquid-cooling-ready valve platforms. With data centers becoming critical infrastructure, demand for precise, reliable and highly automated valve systems is expected to maintain strong growth over the next decade.

Report Scope

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

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

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

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

Market Segmentation

Segmentation by Type:

Ball Valves

Butterfly Valves

Globe Valves

Gate Valves

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Check Valves

Pressure Independent Control Valves (PICV)

Others

Segmentation by Control Method:

On/off Valves

Regulating Valves

Segmentation by Application:

Enterprise Data Center

Colocation Data Center

Hyperscale Data Center

AI Data Center

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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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.

Bray International

Max-Air Technology

Griswold Controls

Honeywell International

Johnson Controls

Schneider Electric

Siemens AG

Danfoss

Belimo

Emerson Electric

Flowserve

AVK Holding

IMI plc

Pentair

Mueller Industries

Taco Comfort Solutions

Victaulic

Samson AG

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Nexus Valve

CIAT Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global HVAC Valve For Data Center market?

What factors are driving HVAC Valve For Data Center market growth, globally and by region?

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

How do HVAC Valve For Data Center market opportunities vary by end market size?

How does HVAC Valve For Data Center break out by Type, by Application?

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