

Global Hydronic Balancing Valves for Data Center Market Growth 2026-2032

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Abstracts

The global Hydronic Balancing Valves for Data Center market size is predicted to grow from US\$ 79.26 million in 2025 to US\$ 258 million in 2032; it is expected to grow at a CAGR of 16.5% from 2026 to 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

LP Information, Inc. (LPI) ' newest research report, the “Hydronic Balancing Valves for Data Center Industry Forecast” looks at past sales and reviews total world Hydronic Balancing Valves for Data Center sales in 2025, providing a comprehensive analysis by region and market sector of projected Hydronic Balancing Valves for Data Center sales for 2026 through 2032. With Hydronic Balancing Valves 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 Hydronic Balancing Valves for Data Center industry.

This Insight Report provides a comprehensive analysis of the global Hydronic Balancing Valves 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 Hydronic Balancing Valves 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 Hydronic Balancing Valves for Data Center market.

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

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

Segmentation by Type:

Static Balancing Valve

Dynamic Balancing Valve

PICV

Segmentation by Function:

Basic Electronic Balancing Valves

Communicating Balancing Valves

IoT-Enabled Smart Balancing Valves

Segmentation by Location:

Terminal Unit Balancing Valves

Branch Balancing Valves

Riser Balancing Valves

Plant Room and Main Loop Balancing Valves

Others

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

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

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 Addressed in this Report

What is the 10-year outlook for the global Hydronic Balancing Valves for Data Center market?

What factors are driving Hydronic Balancing Valves for Data Center market growth, globally and by region?

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

How do Hydronic Balancing Valves for Data Center market opportunities vary by end market size?

How does Hydronic Balancing Valves for Data Center break out by Type, by Application?

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